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ABSTRACT

The Quality Education through Staff Training (QUEST) program is described. The professional development program was conducted in the Detroit Public Schools. The major goal of this project was organizational change and renewal to influence the quality of classroom instruction. This was to be achieved by helping teachers and administrators to effect the changes they most desired which they believed were connected with the ultimate outcomes of improved educational experiences for children. Four phases of the program included the start-up entry, involvement, and training; support for teamwork and follow-through; skill development and application; and evaluation. Experiences and highlights from the program are presented. Chapters one through 12 describe the program in action; offer some participant observations; discuss assumptions and guiding ideas about the program; explore how the participants organized the implementation; describe team training and how the program started; discuss the follow-through on plans and commitments; describe the development of the how-to-do-it skills; offer documentation and assessment of progress; focus on leadership skills and roles needed; offer some improvements and possible modifications; provide a resource list; and enumerate activity tools needed for carrying out the program. The tools, 32 class handouts, are included in chapter 12 as exhibits. (ND)

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Quest for Quality Education

Team Building for Professional and Organizational Development

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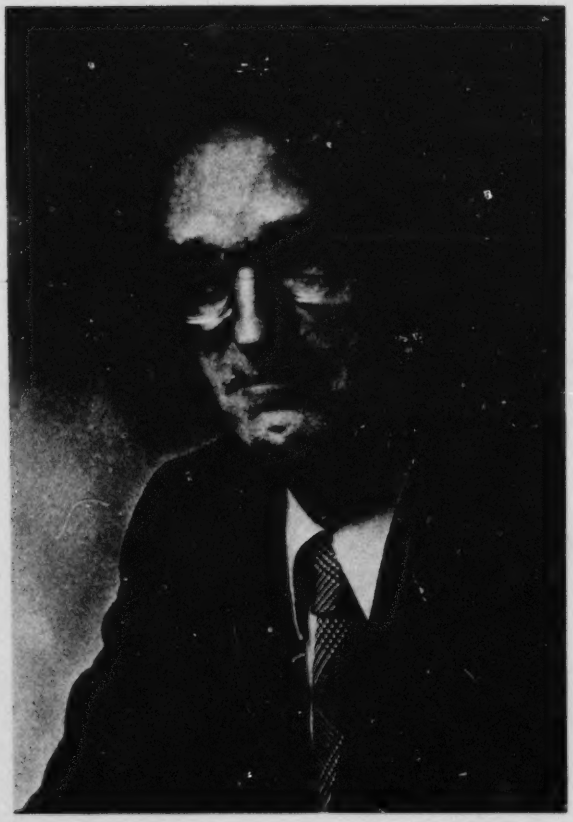
Dedication



Dean Edmundson

The three of us dedicate this volume, with deep appreciation, respect, and affection to our co-author, who was the generator of QUEST.....and major factor in its success. He has been a unique "school administrator experience" for each of us. We envy and support the new lifestyle he is launching with his retirement.

Larry Lippitt
Ken Cowing
Ron Lippitt

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The Administrator's Perspective

Historical Note

I have always believed that a feeling on the part of people that they have a stake in the organization grows out of the opportunity to influence the decisions that affect their lives within it.

As a beginning superintendent, thirty years ago, I involved the entire staff of a small suburban school district in the State of Washington in identifying the specific skills and understandings they felt were important in the various subject areas as a framework for planning instruction. I also initiated two day teacher workshops prior to the opening of school for the purpose of identifying teacher concerns and planning what action we should take in relation to those concerns. With the prospect of a new high school facing us the high school staff was commissioned to develop an instructional program for that community, and the high school was planned around it.

My second year in Detroit I initiated an administrative training program based on the Monroe City Public Schools simulation materials. Fifty elementary and secondary principals and assistant principals were involved in a week-long program under the direction of Dr. Daniel Griffiths of New York University and Dr. Norton Beach of Teachers College Columbia. This program was repeated for three successive summers, after which Drs. Griffiths and Beach were no longer available.

Thereafter, for several years, I headed a city-wide Committee on Administrative Training. Our major activity was a series of workshops for persons on the eligibility list for advancement to the assistant principalship. These workshops were intended to orient beginning administrators to the intricacies of organization and management of the fifth largest school system in the United States so that, once they were promoted, they could function effectively within it.

Next an opportunity arose to involve six schools in the Cooperative Program in Educational Development. This was a program designed to develop skills in problem solving, teamwork building, and gathering and using objective data, using a building team consisting of the principal and two teachers. It was funded by the U. S. Office of Education and we worked directly with the University of Michigan in the persons of Dr. Ronald Lippitt, Dr. Robert Fox and Dr. Charles Jung. This program was not refunded for the second year, but the impact on most of the people involved was very significant.

As an outgrowth of my experience with this C.O.P.E.D. program I developed, with the assistance of Dr. Stuart Rankin of the Detroit Public Schools staff and Drs. Ronald Lippitt and Kendall Cowing of Human Resource Development Associates of Ann Arbor, a proposal for a training program which I called Quality Education Through Staff Training. (QUEST). We were successful in obtaining a grant from the McGregor Fund to help finance this professional development program.

Then came the Detroit Public Schools Achievement Implementation Program which provided funding for a broad based and intensive staff

training program with training specialists assigned to each region. Our QUEST project provided startup designs, materials, and personnel for this program. I believe this program will turn the school system around and within the near future enable us to demonstrate significant improvement in the quality of our product.

Educational Philosophy

Formal education, as provided by the public school, is essentially a cooperative enterprise. It is true that one good teacher can take a group of children into her classroom, shut the door, and teach them regardless of what goes on in the rest of the school. However, if there are goals commonly determined by cooperative action of the total staff they are likely to be accepted and understood, and most of the staff will be committed to them. Under these conditions the school can operate as a harmonious organism fostering and supporting the best each member can contribute. It is likely, too, that in such a setting the school can have a maximum impact on its pupils, teachers can work with a greater degree of success and satisfaction and thus, ultimately, the expectations of the community may also be met.

In our attempts to improve the quality of education we have most often introduced a new technique or method, installed new textbooks or a new course of study, brought in new teaching materials or hardware or, perhaps, a new plan of organization. The necessity for these measures is not ignored in this project. The central theme, however, is grounded on the proposition that any significant change in the educational experience of a child will require a fundamental change in the behavior of the staff at all levels. Such a change can be effected by focusing on solutions to problems of administration, teaching and learning that are of immediate concern to the staff members, using these problems as the content for study while consciously and intensively examining all aspects of the process the group uses as it moves toward solutions. The goals must be found in the reality faced by each teacher or principal involved in the program.

Led by the principal, the school must become an open social system in which all members, (administration, staff, students and parents) come at last to view themselves as partners in a learning laboratory sharing in setting goals, making plans, testing the plans and evaluating the results.

The most casual reflection upon our experience should reveal to us that, though we have talked about this kind of school, few people have had the necessary knowledge, skills and courage (or support) to bring it into being. The program here explored has led us toward discoveries as to how a school staff may be brought to this high level of effectiveness.

W. D. Edmundson
May 23, 1975

Overview of Our QUEST Adventure

This experiment in the improvement of education was called QUEST—Quality Education Through Staff Training.

The urgency and the sensitivity to the need for improvement of the education of our young emanates from many sources:

—the young, themselves, are expressing discontent and questioning the meaningfulness of much of their school day.
—the teachers express discontent and disillusionment with their status, their administrative support, the resources for teaching, and the response of the young.
—the administrators are irritated by the discontent of parents, puzzled by low staff morale, and frustrated by the counterbehaviors of the students.
—the parents are puzzled by the lack of interest in learning by their children, feel excluded from partnership with the school, and feel apprehensive about the future of their children.
—the community citizens feel burdened by financial demands for education, seldom rewarded by any feelings of pride in their school system, and increasingly distrustful of the competence and commitment of the educators.
—the educational experts express dismay at the low quality of education, and the great lack of use of new knowledge about learning, curriculum, and the management of school systems.
—and the funders, state, federal, and local, are increasingly demanding evidence of accountability in the teaching of children and youth to master the skills and concepts and values needed to behave appropriately, perform competently, and demonstrate the moral qualities and commitments of citizenship.

These voices of discontent and frustration often seem particularly puzzling because of the continuous flow of exciting images about new potentialities for education, which are communicated through the mass media, through reports of demonstration projects in educational reform, and the great variety of workshops and training institutes aimed at stimulating educational innovation.

But somehow there seems to be little breakthrough of excitement and much evidence of bureaucracy, staff apathy, and preoccupation of the professionals with income, benefits, status, rather than excitement of the mission of teaching, and the use of new ideas and resources for the improvement of teaching.

A variety of approaches to the improvement of education have been developed and demonstrated—demonstrations of innovations, organizational development programs, modular scheduling, team teaching, etc. From our previous inter-university experiment, with a variety of ap-

proaches to improving the quality of education, we had come to the conclusion that one of the most effective approaches was a process of staff involvement in educational change through the leadership of peer teams in each building who had been selected for their leadership potential and received intensive training in the techniques and strategies of initiating educational excitement in their building, with linkage to external resources which they could call on for help at appropriate times.

This is a report of our effort to put this idea into practice in a large sector of a metropolitan school system.

Although we completed only one year of experiment, we believe the feasibility and validity have been demonstrated and we want to share the experience and design and evaluation with you so that you can be stimulated to experiment also.

The four of us composed the inside-outside team that gave leadership and support to the development and implementation of the activity.

The real leaders of the program were the building teams and their peers who became inventors and innovators within their classrooms and their buildings.

In the report which follows, we have tried to share our experience fully enough for you to be able to utilize it, and also to share our difficulties and limitations, and our ideas about how you might be able to do it better than we did.

One year is, of course, too short a time for a complete report of pay-offs in the improvement in the quality of education, but we believe the evidence of the ways things are moving is clear from our documentation and evaluation reports.

We hope the pages which follow turn out to be more of a "tool" rather than just a "report". We are trying to take you inside our experience as effectively as we can in the brief excursion time available, and we've tried to share with you our critical reflections on what is required to make enough of an impact on the educational process through team building to actually stimulate new motivations, new perspectives, and improved quality. Then we've shared with you the way in which the effort was organized, the training was conducted, and the support for change was maintained.

Here is the flow of the adventure we'd like you to share with us. We hope you will find it a stimulus for you and one which you will want to share with your colleagues.

1. *Glimpses of What It Was Like*. In this chapter (Chapter I) we try to take you into the experience with us by a series of selected snapshots of what this experimental program looked like in action. What were the administrators doing? What were the teachers doing? What were the change agent teams doing? What kind of help was being given by the outside consultant resources?
2. *What They Said About It*. In this second chapter, we have sampled, from our documentation, comments by participants expressing the feelings and meanings for them of participation in this type of staff growth effort, and expressing some of their own observations about

the outcomes of the activity for them as professional practitioners responsible for the learning of children.

3. Then with these images in mind of what was going on and how participants were reacting to it, we step back to share with you the *assumptions we were making* and the guiding ideas we were using about what is required to introduce educational reform into the crowded, busy, ongoing life of the classroom and the school building (Chapter 3).
4. Then in Chapter 4, we report to you *how we organized for action* to try to implement our guiding ideas and assumptions. This is the overall picture of strategy and organization within which the next parts fit.
5. *Getting Started.* In this chapter (5), we share our successes and failures in eliciting the critical involvement of the administrators, followed by the very crucial activities of identifying appropriate leadership teams in each building. Then we report in some detail one of the most crucial elements of the total program, the start-up training of the teams to develop plans for initiative in their own building and to develop competence in working together as teams.
6. *Supporting the Follow-Through on Plans and Commitments.* Start-ups quickly fall by the wayside, with subsequent frustration and guilt, unless there is a careful design for support during the risk-taking follow-up period. One of the greatest strengths of the QUEST Project was its design for support. Some of the problems and difficulties of educational change stand out clearly here in our assessment of problems of providing support (Chapter 6).
7. *Developing the How-To-Do-It Skills.* A good intention is only as strong as the skill to carry it through. A key aspect of the QUEST training activities was the emphasis on actual skill practice with feedback and re-practice to develop the behavioral skills needed to "get over the hump" of trying out and to reduce the risk of failure of first efforts (Chapter 7).
8. *Documentation and Assessment of Progress.* A unique aspect of the QUEST program was the documentor role as part of each building team to ensure the description of the flow of success and failure in the efforts of the change agent teams. The documentors also represented the link for data collection in each building to get the collaboration of teachers in providing assessment data (Chapter 8).
9. *What Skills are Needed to Make This Work?* In Chapter 9 we try to highlight the competencies needed by administrative leadership, and by internal and external support consultation to make this kind of development activity really work. The skills and roles of leadership, and how to develop them, must always be clearly in mind if we are to plan and implement an effective design for change.
10. *Would It Work For You? With What Modifications?* We've tried to reflect on the various types of educational situations we are aware of, and have tried to think about what your particular situation might be as a reader of this document. We also have in mind some improvements we would like to recommend to you from our experi-

ence. These challenging questions of adaptation and application are the focus of Chapter 10.

11. *Some Further Resources If You Have Time.* In the busy schedule of our professional lives, it is important that we use our professional reading time effectively. In Chapter 11, we make some suggestions about what you might find particularly helpful. (Chapter 11).
12. *The Tools You Might Need.* As you get involved in this kind of activity, you will be developing your own tools, but we believe there is great value in having some examples of tools that have worked, which you may want to use or modify. (Chapter 12).

We hope this brief overview heightens your anticipation for joining us. Before we begin, we the QUEST leadership team, would like to introduce to you (next page) the staff of collaborators who became involved in this activity, and who have contributed their experimental vigor and risk-taking, the disciplined documentation, and the excitement which we believe characterize this program called QUEST.

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Chapter I.

Glimpses of What It Was Like

The major goal of this project was organizational change and renewal to influence the quality of classroom education. This was achieved by helping teachers and administrators to effect the changes they most desired which they believed were connected with the ultimate outcomes of improved educational experiences for children.

As in any project which intervenes at multiple levels in a total system, we all began to make some ripples quite rapidly. As we look back and describe glimpses of what this project looked like, we are really describing some of the many ripples generated during the first year. As we share our experiences with you, and even as you read this account of our exciting experience, new events are taking place as a result of activities begun one, two or even three years ago. We keep hearing of new projects, events and ideas spinning off from dynamics and alternative processes introduced by this project.

Here are a few glimpses into project activities and "ripples".

Planning and Thinking on Company Time—a change in priorities.

During the first 2 months of the project 50 teachers, principals and central administrative staff spent 3 days away from their normal desks and telephones engaging in hard thinking, soul searching and educational goal setting. This took place off site, mornings, afternoons and evenings while their pupils still attended school daily and classes were covered with substitute teachers. Ideas were being shared, goals being formulated and decisions being made which would affect the quality of education in the entire system. During this time the teachers and administrators were openly sharing their dreams, fears and ideals.

Later in the year we saw that the social workers and psychologists were charged with designing and implementing a "team approach" to provide services to children in the schools. The heads of those two departments (with no history of doing so) had pulled in their entire staffs to the central offices for a day long meeting. The goal was to share ideas, concerns and ideal images in order that everyone be involved in shaping what the program will look like—how it looks in the central office right down to each school. These activities were temporarily taking the place of seeing teachers, children or doing case reports.

Considerably later that year, two assistant superintendents were asked to speak at an assistant principals' conference. They decided to put their two sessions together so they could have the group for a longer period. They decided to provide a participatory experience where participants

would exchange ideas and practice skills in simulation situations. This meant a half day of planning and a two hour presentation of their design to a third party (the internal-external consultant) for reality testing and feedback. This was very different behavior than writing a speech at home and presenting it while everyone was passively participating. This was a risky thing for these two people to try. They got rave notices and the principals indicated it was one of the most worthwhile inservice sessions in years.

Inside/Outside Resources

The typical use of an outside resource is that of an expert coming in for a two hour inservice session, or even for a few more follow-up sessions, but not to come and live with the problem and the clients over a time. The QUEST Project presented an alternative example.

On a Wednesday after school one of the QUEST change teams was meeting as they often did. Their concern was to take the next step on their time line chart, to realize their goal of involving the rest of the faculty in goal setting and decision making, and to eventually transfer the leadership function to new people. There was an inservice day coming in two weeks and their concern was to use this time to meet with the total faculty in a way that involved them in goal setting. Sitting with them was the QUEST coordinator helping them to formulate their program ideas and periodically to help them look at how they were working together. The coordinator had been with the team at the first 3-day workshop when they had set their goal and action plan and was acquainted with the issues in the school and on the team, and had been to the school several times.

Another example of the inside/outside consultant teaming with inside people at another level—a social worker, psychologist, department head of social work and two assistant superintendents and the QUEST coordinator are meeting to plan a team building event for the *entire* central administrative and consultant staff. This is the second half day they have met. They have reached the point where a specific design for the meeting has been established. They are deciding who is responsible for each segment of the program. Previous to this the group had attended a professional development workshop for two days, offered by the external consultants for leaders from several systems. When they returned they had presented their proposal to the superintendent for an internally focused staff development effort and had received approval.

Another snapshot of ongoing consultant usage took place at one of the later training workshops. All the change teams were working on identifying successes and failures and next steps. One team called over one of the four consultant staff. They indicated they were really stymied on where to go from here. It seemed there was a split between two options and they were going around and around on the issue, getting nowhere. They were beginning to feel very frustrated. Their request was that the consultant not give them any advice on what they should do, but to just watch as they continued to work. They wanted to know what was blocking them in the way they were working together. After several minutes the consultant

called a "stop action" and described in detail how some very good points were being missed because the members of the two factions were not listening to each other at all. There was a tremendous release of tension and joy as they understood what they were doing. They had their plan 10 minutes later. This group had learned how to skillfully use an outside process consultant and turned the tables toward success rather than failure as a change team.

Linking Planned Organizational and Personal Change

In one snapshot we see a team of teachers and principal sharing their personal images of how the school could ideally look next year. There are ideas which individuals are personally committed to and excited about. They will find the energy to make them happen as the consultants help them make their personal images clearer. When they share them, a further source of energy and excitement is the discovery that "some of the others agree with my ideas and think those same things are what *they* want to see happen—Wow, I'm not alone. My principal had the same idea. I never knew he thought that way!

At another time, principals and teachers of the change teams have taken two hours "recess" from their joint goal setting and planning action for the year. They are focusing on personal goals for change and action in their own lives. The same problem solving procedures which have been learned and applied to organizational problems and issues as teams are being used for personal planning. One question which individuals are addressing is: "How does your team goal relate to your personal/professional goals? Do they overlap? Are they consistent?"

Peer Support

Peer support is a tremendous potential source of energy for improved education in any system, but is seldom tapped except by an occasional small group or pair of teachers, usually for survival purposes.

In one example of major ripple created by QUEST, we see a group of 50 teachers sub-grouped in threes and fours to share teaching ideas, procedures and techniques they have personally invented to manage classroom behavior, and teach curriculum content. There is some initial timidity (teachers often take their own good ideas too much for granted), but as the conversations continue eyebrows get raised and faces light up, both as a person hears of a helpful teaching idea or has his idea seen as helpful. A little later dittoed documentations of the ideas discussed in the subgroups are handed out to all the participating teachers. Forty or fifty new teacher-made ideas were placed in each teacher's and principal's hands in that 3 hour period. A lot of energy and resources had just been released within the system, across schools.

At another time we see two teachers, from different schools, discussing their perceptions of successes and concerns as they have worked as mem-

bers of change teams in their respective schools. The conversation has the tenor of helping each other to become clear on their own perceptions rather than a tone of griping or competing. Help is being exchanged in a professional way.

Changing Roles or Job Definitions

Most principals began to increase their skills necessary in becoming educational facilitators rather than strictly administrative managers. In the training sessions, and during the work of the training team back in the schools, the principal was a *member* of the change team.

At a workshop we see 3 teachers and a principal clustered tightly about a large newsprint easel. There are several items under consideration (improving communication between the faculty, raising esprit de corps of faculty, discipline in the halls, getting everyone involved in setting school goals) and the discussion is animated. The principal says, "Well, Bill, you suggested the communication item. Could you tell us more about what you had in mind?" The tenor is that of the principal involved with the teachers in setting a goal for action, rather than providing one for the group.

Later during the year a team of teachers and principal are meeting after school to plan a sequence of inservice days. The members are aiming most of their comments towards the principal. He says, "It sounds like we have a lot of good ideas here. I am not going to decide what we shall do. What do we think as a group?"

Many times over we heard teachers exclaim, privately or even publicly, "Wow, I feel my principal is a real human being who I can talk to and work with. I never realized that before."

In addition, an often repeated image was that of a teacher stating happily or excitedly to a consultant or peers that they had been trying some of "these group leadership techniques" with their classes with success, often to their amazement. Some teachers started helping their classes with interpersonal skills such as listening and feedback skills. Others reported success at helping the class learn to establish goals individually or jointly and to develop the plans to carry out the necessary learning activities in the classroom.

Half-way through the year the psychologist and social worker who worked in a common school were meeting with the principal and two teachers, during free periods, to plan a special program for slow learners in the school. Presently the program is operating in that school with success. It is still a cross-discipline effort and parents are also being involved. This began when the social service Consultant and the Curriculum Consultant discovered common concerns at a QUEST Planning Workshop.

Later during the year the psychologist made a personal comment to the inside-outside coordinator (their offices were next to each other), "Boy, this involvement in QUEST has helped me to get out of the role of tester. Now I can work with teachers to create new programs, or I can consult

with them regarding *their* concerns in the school." Subsequently this person began to work closely with the coordinator in a co-consultant capacity for inservice workshops and special meetings in several of the schools.

Role of the Administrator

The administrative role may be thought of as consisting of two sub-roles, sometimes distinct, sometimes merging. One of these sub-roles is leadership—which embodies the capacity to generate a sense of direction, purpose, a sense of commitment to the organization, the ability to turn others on. The other sub-role is management, which embodies the capacity to organize the human and material resources of the institution or organization so that its purpose may be achieved.

As a function of both roles the administrator must take responsibility for staff development—for improving the quality of service rendered. The administrator must look upon himself or herself not only as a leader but as a learner, constantly seeking to improve leadership and management skills, and also to be responsible for providing opportunities for self improvement, so structuring the situtation that they understand and are committed to a program of self improvement.

One snapshot of a very important event happened during the training session of change teams from various schools. We find a team looking much like many of the other teams of teachers and principals. This one contains the superintendent, his two assistants, and the reading coordinator. They are working on their action plans to achieve a specified goal. (They have been present at all the meetings and will continue to be.) Their present task is to put their work on a ditto master, as all the teams are doing, so it can be run off, shared, and critiqued as will be the work of all the teams.

Another image is that of the superintendent reaching into special inservice funds to allow a team of his assistants and social service staff to attend a weekend workshop to further augment their leadership and process skills training which has been received through the QUEST Project experiences.

Another snapshot is that of the superintendent engaging in a session focusing on listening skills to improve his own abilities along with his teachers and principals. Later various comments were made like: "It really feels like we are up to some very important work. The administration is really working hard right along with us." Or, "You know Dr. Edmundson is actually fun to talk with and he really does care what happens to us and to kids!"

Accountability

A popular, or unpopular, concept current today is the idea of accountability. Questions abound as to its meaning. If we accept as a definition

that accountability means effectively doing the job one is paid to do, much latitude remains in establishing goals, developing programs and evaluating results.

We have used a team approach with a principal and 3 to 6 teachers comprising each team, depending on the size of the school.

Our training program got at the issue of accountability via a focus on individual and team skills related to communication, problem identification, decision making as it related to program development and evaluation. The evaluation aspect responded to this requirement for accountability.

During one of the earlier planning workshops each team had worked hard and long to formalize goals and specific action plans. These were reported publicly for all to hear. This increased commitment introduced an element of accountability as plans were publicly stated.

In another image, the project had been going a year. In the beginning (March) teams participated in a 3-day workshop.

One outcome was that each team chose a goal, developed a detailed statement of what was involved with reaching it, including specific outcome statements, and were committed to specific actions to be taken. They shared these with other teams having similar plans. Two months later they met again with the other teams to share successes and failures and to re-establish their commitments with each other. Before school began the next fall goals and plans were evaluated, successes and changes shared and commitments restated to each other. Finally, a year later (March again) a whole day was spent identifying successes and concerns and indicators that things were working or not working. Again directions were assessed, renewed, altered by teams and commitments for future action made public again. Excitement was high and people were glad to see each other again and were interested in the actions of other teams.

These activities were taking place within the context of a concern for making things happen to improve the quality of education and to share resources, rather than this being a mechanism for externally imposed accountability. "Accountability" happened to be the most loaded term in this system at the time.

Quality Education Can Be Fun

We have found that learning can often be fun, when we find it going on. Another thing we have noticed is that the facilitation of that learning also turns out to be fun.

In the QUEST project much time was spent on goal setting and planning, as well as implementation. This is often experienced as or thought of as a tedious or painful activity. But a snapshot of this happening in the QUEST project shows a group of people whose faces are animated and excited. Very creative and specific statements are being made about what should be happening next year—between teachers and kids, kids and kids, principal and teachers, how rooms are situated, what do halls look like. The ideas are specific and performance oriented. At times they in-

clude basic skills in English and Math and basic concerns such as self concept growth, skills of deciding and planning one's own learning activities. For a while the drudgery of creating educational goals and plans is gone. It is enjoyable and exciting.

Later that year we can see a group of teachers and the principal looking happy and satisfied and rejuvenated. They have just taken time to list the major successes they have achieved since they began work together on a mutually formed goal and action plan. There is a sense that "Yes, we *can* make it happen".

Summary

These were glimpses of some of the countless ripples which were sent throughout the system. They are really snapshots of the types of things which were going on within or because of the QUEST Project. In the next chapter we would like to briefly share some more observations in the words of some participants. Their quotes help paint the picture of types of participation, concern and excitement.

Chapter II.

What They Said About Their Participation

To complement the foregoing vignettes of QUEST in process, we report here a sample of comments, quotes and events related to us directly by the participants of the project, which they were attributing to their involvement in the project. This type of information was systematically recorded throughout the year, as one thrust of the ongoing evaluation. The sources of information were either short pencil and paper evaluations (from continual diagnosis of needs), informal discussions (at workshops or in schools, etc.) or chance encounters (where a participant was bubbling over with a recent success or wanting to share a frustration). The information falls into two categories: personal learnings (personal/professional, group leadership oriented, planning skills oriented, and organizational awareness and skills oriented); or activity anecdotes (events and stories of realized plans, or serendipitous happenings, from classrooms to administrative office).

Learnings

This kind of project—inservice training and laboratory learning based—gives rise to a great variety of learnings which differ from participant to participant, or consultant to consultant. (Though we were learners as well, our comments and learnings are not placed in this section). Therefore, it would not be adequately descriptive just to report that most of the participants grew personally/professionally or that they all evolved greater group leadership skills. That gives no specific flavor of the outcomes from the participant view. Therefore we have classified and listed a series of representative quotes.

Personal/Professional Learnings

These statements represent each person's own world. Quotes have been omitted, and minor changes, only, have been made to improve the clarity of meaning for this context.

—I now have a clearer picture of how others see me
—This has helped me to see myself differently in my leadership role.
—My principal isn't negative towards my ideas.
—I got support for my own teaching, i.e., use of brainstorming, etc.
—I learned that others have similar problems.
—I learned how to speak to new large groups of people.
—I learned that when people try to be open and real there is more peace and friendship.

—I gained confidence in my ability to present ideas to a group.
—I learned ways to cope with problems head on rather than evading them.
—I learned a better approach to teaching.
—This has reinforced my own beliefs about education.
—I have learned that we have some influence over what happens.
—This has improved my understanding of classroom dynamics.
—This has improved my teaching skills, such as listening, and shared participation techniques.
—I have gotten to know teachers on the staff better.
—I feel an improvement in student-teacher relations.
—I have really experienced team cooperation.
—Students in may class love our new classroom and are excited about doing the new things I have learned.
—I am increasingly becoming aware that things can be changed and improved.
—I feel greater job enjoyment and satisfaction.
—I have an improved awareness of myself.
—QUEST involvement has been very meaningful to me—It has given me leadership skills that were not received from college courses or other workshops. (As a fringe benefit I have made some wonderful new friends.)
—QUEST has provided me with valuable opportunities to practice skills needed in order to design a specific program and in-service workshops.
—QUEST has encouraged me to prioritize my own professional goals and to broaden the awareness of alternatives available to me in accomplishing these goals.

It is apparent, and will continue to be so, that QUEST had many facets and faces, dependent upon what needs and current skill levels each participant brought with them.

Group Leadership Learnings

We viewed the first set of learnings as important, because some degree of personal/professional growth is necessary if we want peoples' enthusiastic and continued participation and support. It is our contention that people will gladly become involved and stay involved if they are growing from or getting some of their own needs met from the experience. One of the major reasons for reduced participation, over time, in work groups and continued meetings like parent-teacher meetings or special committees is that the personal/professional needs have ceased to be met.

The reason we feel that group leadership skills were of importance is that the change teams from each school would be involved in working with their colleagues back in their school. They would be initiating activities and new procedures. Traditionally, the skills necessary for helping systems to become more participatory are not formally or informally

taught to teachers as part of their training, and traditionally administrators get no special training in this area.

Again we have a list of participant statements which represents the variety of learnings which occurred:

—I have learned techniques for developing teamwork and better communication.
—I have a heightened awareness of how groups function effectively.
—I now know how to deal with negative attitudes which tend to block realization of goals.
—I can use brainstorming and prioritizing in school meetings.
—I now realize the value of talking things over in groups.
—I have acquired some techniques of group participation.
—I learned techniques of handling meetings with community and faculty.
—I can better understand peoples' feelings and appreciate them more in group meetings.
—I now see brainstorming and the various roles a leader can play as good tools for starting the flow of communication.
—I have a greater understanding of group process and goal setting.
—I now know some ways to get cooperation amongst staff.
—I learned techniques for group meetings.
—I have learned leadership skills and ways to share leadership.
—I have learned ways to work more successfully with staff.
—I now understand the necessity of meeting regularly.
—I learned it is hard to involve the faculty.
—I have more awareness of individual needs of group members and how to deal with them.
—I have learned that the staff needs feedback and support.
—I have learned how to plan more effective meetings.
—There are ways to bring staff together and open up communication.
—I have more understanding of group process.
—I have learned ways to deal with staff and get cooperation.

Each person had a different skill level and each team had the particular issues and problems which they faced in their school. Individuals and teams seemed to find things they needed, in the training and in the at-the-elbow help.

Learning about Planning

It was our concern that even if you get some well functioning teams and change agents or leaders who are adept at facilitating team building and communication, it is still possible to fail. Without specific and basic skills in planning and problem solving, groups can still become blocked and frustrated with their inability to take action.

Therefore, much of the workshop time was spent in learning a planning model and a problem solving process.* There were few didactic sessions.

*See Chapters 4 and 5 for further descriptions of our planning and problem solving model.

The model and process were learned by identifying a real problem, establishing a real goal, developing a real action plan, executing it and evaluating it.

Since this was a major thrust of training and discussions, many of the stated learnings fell into a category of learnings about planning.

—I learned ways to effectively set goals, plan programs and implement them.
—I learned the importance of giving serious thought to a problem before attempting to reach a solution.
—I learned ways to set a goal and achieve the desired result.
—I learned how to approach problems and push through to action.
—I learned to approach problems from a logical sense.
—I learned how to consolidate ideas and formulate a plan of action.
—I learned some methods for goal setting and crystallizing ideas.
—I learned that our team needs to get goals more specific and plan more.
—I have learned techniques for planning, i.e., constructing a time line and clearly stated goals.
—I learned new ways to look at problems.
—Planning can revitalize our ideas.
—I have learned a lot of valuable techniques in goal accomplishment.
—QUEST training has helped me in organization toward specific goals and objectives.
—QUEST has helped me work with those in Psychology and Social Work services to think through both short and long range goals and plan meetings and activities which support those goals.

The learnings were diverse. In addition, participants all began to develop a much more sophisticated concept of planning. The notion that special planning takes time and that good planning breeds success became accepted. At this point the system began to become confronted with the need for planning time during the day or during faculty meetings after school. It was noted that planning time often came out of the teacher's or principal's own time after hours.

Organizationally Focused Learnings

Some of the stated learnings fell into a fourth category. They were more organizationally focused. Again this is not surprising. One of our major concerns had been the need for people in a system to be able to think and view things from a systemwide point of view, rather than just becoming totally involved in their specific bailiwicks. If we were to train change agents and stimulate participatory planning through which new procedures, processes and techniques would be designed and implemented, and organizational structures to support these, the teachers and principals would need to be able to see and understand dynamics on an organizational level, not just a group level.

Some of the organizationally focused learnings were:

—I learned ways to develop leadership in the school and use available resources without depending on the traditional chain of command.
—I gained a deeper awareness of how programs function.
—I now understand that there is a need for persons working towards a goal to meet and work closely together.
—I now understand the importance and need for on-the-spot and at-the-elbow support in each school.
—I now understand how important principal support can be.
—I now see that there are different ways to organize a school.
—You can't work with a large faculty as a total group—you need to break them into smaller groups to develop teamwork, and plans.
—The ways things are set up now it makes getting together to plan or develop team cooperation very hard or impossible.
—Continued leadership training is necessary.
—I have learned a modus operandi for carrying out program ideas in ways that incorporate the best production of *all* those that participate.

There were fewer stated learnings in this area. This is probably reflective of the amount of emphasis which was placed on this in the training. This might have been a weakness of the project. It will be discussed later.

Anecdotes

Many stories were told of successfully implemented plans, unsuccessfully implemented plans, meetings which went well, unexpected spin-offs, and other serendipitous events. We will share only a few specific examples, to provide a flavor of the kinds of things which were accruing, and to illustrate the breadth of impact on the system as different and exciting things began to happen.

Classroom Level

As the project progressed we began to point out, in training sessions, that many of the team building, decision making and problem solving techniques could be used to modify and develop the learning climates in the classroom. We also pointed out that the training and skill practice activities used in workshops could be used by teachers in their classrooms with their students. Some teachers didn't wait for us to point this out. After the first workshop some went back anxious to try things with their students. Typical reports were:

1. "Remember how you had us brainstorm what were the things that made for a good or bad day in our school. Well, I did that in my class to begin the next unit. You know, 'what things happen in

here, including things the teacher or other students do, which make you feel it has been a good day or a bad day in our class.' It went slowly at first, but when they saw that I really meant that *all* ideas are important enough to write down on the blackboard, and that I didn't react negatively to some of the ideas, but accepted them, everyone got involved and we had a lot of fun. It was a really good list. I really learned a lot about the class, and so did many of the students, I think. We...when we began to list the things we all could do to make more good days more often, the whole class got tremendously involved. When the bell rang they still wanted to give more ideas and discuss them. I have never had them stay in their seats after the bell like that. I'd like your opinion, but I think the next thing I should do is.....".

2. "You know, I broke the class up into discussion groups last week. I am going to use individual or group projects in this unit. It seems to work nicely. But instead of listing the project options and ideas for people to choose, this time I listed a few examples to illustrate, then put them in small discussion groups to come up with as many ideas as they could on their own. Some groups worked fine. Others were not so good. One got off the topic and didn't do the work and a couple of others had one person dominate and do most of the talking. You know I don't think these kids know how to work in groups. They don't have the skills. I am going to build some group leadership training into this unit, just like you people are doing with us. Do you think I could get right into listening skills? Or should I do some team building and getting to know each other first? I'll probably have to do the listening before I can get into helpful group member and leader behaviors."

School Level

Many of the skills and training activities which participants learned with us were directly applied to meetings and other work with other teachers and parents. Some anecdotes were:

1. "We had the neatest meeting with the parents last night. Well, I got together with Ann (reading coordinator) and Carol (psychologist) to plan our parent meeting on reading disabilities. We didn't want to do the same old introductions of staff. That seems to kill things. I think maybe it intimidates the parents. You know we all knew what each other meant instantly, because we had all been to the QUEST workshops. We were able to plan the meeting together with no wasted time. We used brainstorming to get the parents involved and to understand their concerns and to get their ideas. Most of them came up afterwards and said it was the best meeting they had ever been to. Most of them want to continue working."
2. "Our QUEST involvement helped us make a major change smoothly in our school. Before QUEST we had decided to move to "self-contained" from the Detroit plan. Many of the teachers were

getting upset about new roles and anxious about the change. There was a lot of resistance. We had several meetings where we used small discussion groups and team building activities like in QUEST. Then we focused the discussion and work on concerns. People were able to discuss them freely, because of the team building. When we got into jointly stating what our preferred goals and objectives were, and saw how these could be reached by organizing "self-contained" in certain ways everyone got up on board. We began to help prepare for the changeover. You sure helped us to plan the change and manage it well."

3. "We didn't start with goal setting. We began just sharing our educational philosophies, using some of the value clarification ideas we got during the QUEST training at the last workshop.

People really enjoyed just rapping. Then we had a meeting where we exchanged teaching ideas. That really broke the ice. The whole atmosphere is much more friendly around the school. People are saying "hi" to each other and talking to each other much more, in the halls and after school. Mr. (principal) is even saying "hi" to people in the hall. You know he never came out of his four walls and never spoke to anyone. Everyone is saying he has changed so much. On top of that he has taken on the job of organizing and doing the book ordering for next year. I still can't believe it."

4. (An excited Social Worker encounters me in the hall, we have coffee together.) "I want to tell you the most exciting thing. I want you to know your QUEST training is surely having its effect, even in places you might not expect. I tried out some new ideas in a conjoint family session and it went wonderfully well. Let me tell you the situation: adolescent daughter is trying out her own wings and freedom. She has a job, due to mother's urging. Then parents began putting limits on how she spends her money, i.e., on a winter coat, and get upset about her misuse of tranquilizers. Her father physically punishes her and withdraws privileges, i.e., car. Well, it is getting messy, she has been truant and missing from home at times.

I met with them, with the goal of establishing some meaningful communication. So I needed an activity that would draw the three into a mutual task as a prelude to dealing with expressed concerns. I got this idea from the stop sessions we have during the workshops where we stop in our work groups and fill out short stop action questionnaires, then share the information and feelings with our teammates. Anyway, I gave each person a small legal pad with headings written on different pages, and small talked while I handed them out. Marie was given a sheet for mom and dad, dad was given one for mom and Marie and mom was given one for dad and Marie. The headings were: "One thing I admire in that other person"; "One thing I would like to have that person try out which I would support", and "One thing that bugs me about that person."

They were intent on the task and by mutual agreement placed their sheets face down in front of themselves. Then we have a very task-

oriented discussion for an hour with some significant breakthrough in communication.

As a wrap-up, by agreement, we sent the slips round robin. They expressed relief and were amazed to find that they thought alike on some things, expecially Marie and her father.

Afterwards we all had the neat feeling of handling a highly charged situation with plans for ongoing consultation."

Administrative Level

1. "You know I was terribly resistant to staying overnight when we went to that first workshop. I even told some of my teachers that before I left. Well, when we got back it had all melted away and I was enthusiastic. That impressed a lot of my teachers.

You know I used to feel that there was no other way to do things—reasons why not to try anything else always came up. Now it feels like we could come up with many other kinds of organizational structures! Besides self contained, we could use relief teachers, and we could get lots of other ideas from the teachers."

2. "I am on the District Education Committee" (says the Reading Coordinator). "You know people just aren't working together. Now they are trying to decide whether to go on or not. I told them they needed some QUEST training."
3. "You know, I have really learned to hold turned on meetings, from you," (says one Assistant Superintendent). "It sure makes a lot of difference how you set up a meeting."

In this chapter we have represented several slices of activities which have resulted from this type organizational development intervention. They are representative only. Many ripples and chains of events were initiated and continued to be generated. People kept growing, developing and making new discoveries, and new organizational norms and structures continued to develop.

In final analysis these events and inventions happened because those on the firing line became excited and were provided with new skills and concepts and support to use what they already had within themselves. The work of organizational change was (and is still being) done by them.

In a feedback questionnaire at the end of the year a majority of the respondents indicated that their participation in QUEST had been helpful in improving classroom teaching style, collaboration and communication with colleagues, and self-understanding. The interdependence between personal change, small group process, and organizational development is clearly articulated by teachers, administrators, and central office staff.

Chapter III.

Guiding Ideas and Rationale

As one reads the current professional literature about education and professional development, it seems clear there is an increasing concern about the quality of education and the accountability of education.

But, if one talks to teachers and administrators, it also seems clear that a sense of futility and frustration speaks louder than a sense of challenge, excitement and commitment.

And, if one observes the variety of efforts being made to upgrade the competence of education, it is clear that most inservice education is routine, unimaginative, non-involving, or conspicuous by its absence. The challenge of using our best knowledge about "turning on teams" and "stimulating change" has had relatively little impact on the programs of educators teaching educators to perform more competently and to use the great volumes of new research and theory which continues to accumulate in unused stockpiles.

In this QUEST Project we attempted, as we began, to summarize our observations about educational improvement and inservice education, and to clarify our assumptions about the necessary ingredients of a good design for professional growth and educational change. Here are some of our ideas:

Some Assumptions about the Conditions for Improvement of the Quality of Education.

1. Communication, collaboration and congruent action must develop between the significant "influences" in the lifespace of the learner—the teachers, professionals, volunteers, parents, counselors, administrators and others, if any significant improvement in quality of learning experience is to develop. This calls for a focus on values clarification and educational team building.
2. The sanction and support for professional development, as a priority for time and energy, must come from involvement of administrators as sanctioners and participants in the training process.
3. The inservice training program must involve colleague-peers in supporting each other in the risk-taking of change efforts. It is unrealistic and unfair to assume that individuals can be the agents of educational change—in the classroom or building—without interpersonal support of respected co-participating peers. So, organizational teams should be key elements of the inservice training program.

4. The resource team needed to stimulate and support these professional growth and organizational change efforts should contain both "insiders" and "outsiders". Such an inside-outside team can capitalize on the credibility and expertness of outside resources and the diagnostic awareness and continuity of "presence" of insiders.
5. The key to effective involvement in change is the motivation of voluntary choice and participation. But many who need to be involved are not ready to respond to invitations. So the inservice program needs to pay special attention to "mini-experiences" which will give cautious and resistant staff members a chance to "get a taste" as a basis for becoming involved voluntarily.
6. The clients (i.e., students) are needed as crucial sources of data, and as co-planners of the educational process, if they are expected to be voluntarily open to influence from teachers and others.

Derivations for the Design of QUEST

With these assumptions as guidelines the QUEST Project team derived the following images of what should be the core elements of the project:

1. The crucial unit of the program should be a building team which would be trained to give leadership in professional development and educational innovations in the building. The team should include the Principal or Assistant Principal, and two or more teachers who have acceptance and respect by their peers.
2. All administrators should be exposed to the opportunity for participation by a "mini-experience", and actual participation in the program should be a voluntary action of applying to get in, after such exposure, and an appropriate process of exploring the interest of the staff.
3. The training program should include the development of a Central Office "*support team*" which would be responsible for continuity of support to building teams.
4. The planning and implementing of the total program should be the responsibility of an "*inside-outside*" team which should include external technical resources with competencies in organizational change, staff training, evaluation, and materials development, and internal resources with administration status and clarity of goals, a strong motivation to diagnose and act, and a commitment of time available to provide on-the-job support to participants.
5. The training activities should be a legitimate part of "company time" as much as feasible, although additional volunteer and/or paid time should be considered.
6. The major motivation for continuing with growth efforts and organizational change efforts is the experiencing of early success and positive feedback in regards to personally planned change projects.

This should be an important part of the design for inservice education.

7. Most of the knowledge, or goals and good intentions, which are generated by inservice development programs never get actualized in behavior—i.e., good intentions are not reflected in "pay-off behavior". Therefore, a major focus of inservice-training should be skill practice and skill development, i.e., the converting of good ideas and intentions into skilled behavior.
8. The need for change is generated in many systems (e.g., business, health) by the feedback about inadequate results, about failure to achieve the goals which had been set. But in education, this feedback is often lacking or ambiguous as a guideline. So a diagnostic focus on concrete assessment of outcomes is often the needed trigger to motivate change effort in education. And the projection of positive future images of desired outcome is a crucial motivational "pull".
9. As soon as feasible, in any change process, the "consumers" need to be involved in the diagnosis, planning, and action. This means students and teachers.
10. Spread of the successful elements of the program to other units of the system, and to other systems, involves the documentation and implementation of the program, the preparation of multi-media "spread materials", and committed communications.

These were the guidelines which helped us focus our planning, provided criteria for priorities, for timing, and involvement. From our experience with QUEST we believe they have proved themselves as a framework for such educational improvement efforts.

Chapter IV.

The Design for Action

The operation of this educational change effort can be thought of as centering and revolving around three focal roles: (1) the role of Superintendent or top administrator; (2) the role of part-time internal-external consultant; and (3) the role of the building principal. The division of labor and working relationship between these three roles was critical to the initiation and the successful maintenance of QUEST operations.

We can review and describe their functions and relationships under the two headings of: (1) Program Initiative and (2) Program Maintenance.

Program Initiation

The *top administrator*, the Regional Superintendent, provided the initial excitement and mobilization and coordination of resources by involving the external consulting resource in helping prepare a program design and presentation for supplemental funds and in taking this presentation to a source of funds for positive action. During this preliminary period, a sense of teamwork and trust relationship was established between the administrator and the consultant resource team which permitted the administrator to feel that, in terms of accountability to the source of funds, he would be able to "deliver the goods" comfortably on the plans and commitments made in the proposal.

The next start-up linkage was between the top administrator and the building principals. As the staff leader, he was in a position to initiate and legitimize a participative presentation of the proposed activity by the outside resource consultants in his regular staff meeting with his principals. Again, the administrator was taking the risk that the outsiders would do a competent job of interpretation and involvement rather than "bombing" at this critical stage of getting voluntary participation from at least eight administrators. In designing this initial "micro-experience" for the administrators, so they could know "what it would be like" if they became involved, the consultants involved the administrator in the review of the design and co-leadership in the activity. We see, in this start-up period, the administrator being a critical linker, coordinator and facilitator of communication with the source of funds, with his own central administrative team, with the external consulting resources, and with the building principals.

Next we can review the initiation functions of the second key role, the *internal-external consultant*. He was a member of the external resource team. During the start-up period, he related closely to the administrator, led the resource team in designing the core start-up activity with the

principals, collected needed assessment data and established relationships to major associate administrators working under the Superintendent. He was given a well located desk in the central office building.

During this start-up period, the third role was that of the *building administrator* (the principal). He was less active in the beginning but became crucial during the start-up activity period, because his or her involvement in deciding to volunteer and to apply for participation in the project was the critical decision as to what involvement there would be in the project. Probably the respect and trust of the top administrator was a critical element in a large portion of the administrators volunteering to become involved, although the design for participative involvement of the principals in the "mini" (two hour) professional growth experience no doubt helped to validate the importance of the project and the competence of the consultation resources which the project would make available. As we see in the next chapter, each principal had an opportunity to help project the image of potentiality for improvement of education in their building within their own framework of priorities, rather than being sold a particular innovation. This sense of individual attention no doubt greatly facilitated volunteering to participate at this early stage.

Maintaining Motivation and Direction

During this phase, the center of gravity of the project shifted from the top administrator to the internal-external consultant and the school building team. The internal-external consultant was the linker and stimulator and coordinator of collaboration between (1) the top administrator, (2) the other members of the external resource team, (3) resource persons within the school system, and (4) the teams in each building. In his orchestration of the activities, the core consultant was greatly facilitated in his work by having an office in the offices of the top administrator and being closely physically linked with the other central staff and services. The core consultant played a variety of roles. He informed the top administrator about the progress of the project, so his support and sanction and decisions could expedite the movement of the project.

He established a co-worker relationship with the other members of the administrative team. He involved them in planning sessions, used them as consultants on strategy, helped them perceive how their own responsibilities could be facilitated by a sucessful project, and gradually became an informal consultant to them in improving their own plans, meetings, and other functions.

The coordinator began to involve other central resource persons, such as curriculum coordinators, counselors, school psychologists, and social workers, as potential members of the internal support system team which could be crucial at later stages of the project.

He activated regular work sessions of the external resource team to design training activities, and to give guidance on consultation strategies.

During this period of implementation, the role of the school principal became critical. First of all, he or she served as a member of the change

agent building team (not necessarily the leader). The principal also served as the sponsor, sanctioner, and facilitator of involvement by staff members of the building in the activities initiated by the staff team, and interpreted the roles of the teacher members of the team to their peers who had been involved in nominating them.

Perhaps one of the most important activities of the Coordinator was that of facilitator of regular meetings of the building teams, and serving as process and strategy consultant to these teams as they struggled to carry through on their commitments to initiate changes in their own practices and to involve their colleagues in similar risk-taking. Without this regular face-to-face and telephone and memo support it is very doubtful if much of the workshop planning and skill practice session would have carried over into actual successful change.

Looking Ahead to Dissemination and Evaluation

As soon as the building teams were formed, the Coordinator recruited a team member in each building to function as the documentor and helper with evaluation and feedback. He provided special training periods and tools for the documentors and provided them with special support and reward by holding regular meetings with the documentors without the other members of the teams.

Also early in the project the core consultant began to scan the teams for future consultant-trainers who might, by the end of the year, become a cadre of peer trainers to spread the training activities and provide some of the basic support for all participants at times when they were taking the risk of trying out new ideas and activities.

These then were the key elements and centers of initiative, energy, and facilitation as the project developed and operated. The ways in which these functions worked out are described and interpreted in the succeeding chapters.

At this point in your own inquiry, you may want to jot down what things you'd like to get some answers on, or doubts about applicability to your own situation. We believe that if you do reflect on these questions, with yourself, at this point, it will help "tune you up" for the more detailed descriptions of activities which follow.

Chapter V.

Start-Up: Entry, Involvement, Training

Introduction

Start-up, whether it be with a new class, a new school, or new policies and practices within a total system, takes careful planning and an extraordinary amount of effort. Essentially it involves generating new energy and new directions of action within the particular system. Certain norms need to be set and specific dynamics for change need to be initiated. This takes a lot of planning, but can result in a real energy surge in the system. The other important phase is follow-through, where norms and processes are supported and helped to develop and become part of the ongoing operational processes. This second phase is reported in Chapter 6.

Important Norms

There were four basic norms of successful planned change initiative which we worked consciously to establish through our own modeling behavior and our training activities.

1. *Voluntary Participation* was a central norm. It was stated clearly and loudly that no principal or teacher should be involved unless they desired to do so. We stated this in many ways right from the beginning. Since this is contrary to a traditional norm of directives coming down, to be obediently implemented or subverted, it took some people longer than others to believe and understand this, and to support it.

2. *Using participatory techniques in training activities* was a central norm. In our initial meetings to provide information about the project and a flavor of what it would be like to opt in, we illustrated what we meant by the participatory expectations we had. There was an active inquiry design with subgroup and individual work.

3. *Skill focused "how-to" learning* was a central norm for the training and staff development activities. Again we illustrated what we meant by this in our early demonstration sessions and in the first workshops. It was clear that work on development of skills of doing would be expected.

4. *Dealing with real problems* and issues was the fourth norm. The goals that change teams set were to represent what they thought were the most important needs of their roles and their school. We didn't use much simulation or consultant generated issues for illustration. We used their concerns as the central focus for practice and learning and goal setting and action planning.

Important Dynamics

We also initiated or dealt with several intrapersonal and interpersonal dynamics as clearly and as often as we could.

1. *People and groups were pushed and helped to take responsibility for themselves.* For example, they were pushed and helped to identify the most meaningful goals they could think of for themselves and to develop the action plans for reaching them. In nurturing this dynamic, more facilitative helping of articulating their own needs and goals was done rather than external pushing.

2. When we got together *we worked hard and long* and the experience was a detailed confronting of realities, and active availability of consultant help. This was an important dynamic. People began to feel like something was accomplished on real problems, with new resources of their own and others.

3. *The support and active participation of the superintendent and his staff* was an important dynamic. People began to feel they were involved in something important, discovering he was a real person. They could see him working side by side with them.

4. A very interesting and important dynamic was that *people became confronted with a real decision of whether to participate or not.* Some people had a very hard time understanding or behaving as if they really did have a choice. This created a lot of curiosity, incredulity and confrontation to traditional values from the start of the project.

5. Another dynamic which became part of the start-up was that we generated *ambuguity anxiety.* The outcomes were unknown and could only be generally imaged by the consultants. Specific outcomes could only be listed as illustrative and potential. Nothing was assured unless they defined it, and implemented it.

6. A very important dynamic was that people could begin to sense *a reversal of some of the typical processes* which can be found in a less participative or less open organizational setting, such as routinized work expectations, defenses against active involvement, and absence of peer interdependence.

These then were the central norms and dynamics we were either interested in initiating or that were necessary to deal with, during the start-up phase.

The Actual Start-Up Events

The Project really began in the previous year when it was conceived, proposed and funded. This was discussed in the last chapter and we will call that the initial planning and preparation activities. Here, start-up consisted of three steps: (1) Orientation meeting with principals; (2) Team identification and formation; (3) The start-up workshop.

Orientation Meeting with Principals

This was an important meeting. This was the time when we announced the opportunity and tried to sell it. The goals of the meeting were:

1. To facilitate a sound decision about whether QUEST makes sense for your school or not, by sharing as much information about QUEST as possible re:
   a) The project objectives and rationale
   b) The kinds of outcomes which may accrue
   c) The types of commitment necessary
   d) The kinds of liabilities and concerns
2. To share some of our excitement and urge people to seriously consider getting involved.

The goals and design for the meeting illustrate the earlier mentioned norms, such as voluntary involvement, participatory techniques and activities and optionality of alternatives. As with each event, careful thinking and planning had gone into the design of this meeting. The design for the meeting and the outcomes are briefly presented here:

QUEST Principals' Meeting

February 5, 1973

AGENDA & MEETING FLOW

Estimated Time	What Activity	Materials Needed	Who
1:00	Introductions and Greetings who we are why we are here today why we are excited about the program	the agenda and goals on newsprint for display	D. Edmondson Superintendent
1:15	Presentation of the QUEST concept (helping schools help themselves) procedure (staff training) rationale (builds capabilities into the system)	newsprint and easel for diagraming and making notes, and dittoed notes to be handed out at end of meeting	L. Lippitt Consultant
1:30	Image of Potential 5 minute exploration into the future (i.e., the ideal quality of interaction between individuals, administrative structures, curriculum, etc. one year from now) 5 minutes of personal jotting of observations in present tense one year from now.	pencils and paper for all, newsprint easel, with instructions	K. Cowing Consultant

	10 minutes group sharing of images, and identifying priorities		
1:50	What are factors and forces blocking the above? 4 minute personal jotting 10 minute listing 1 minute explaining why we did this (to have this list is to be forewarned) and that we cut it short for the sake of time.	newsprint easel and paper and pencils for all	L. Lippitt Consultant
2:05	Possible outcomes of a program like this one (linked to their previous ideas and expectations) What it would mean for you to become involved	newsprint, easel and prepared ditto sheet of expectations of participants	L. Lippitt
2:20	Discuss in small groups around tables: reactions, important issues, questions for clarification, further information needed to make a decision		
2:30	List the questions...then respond	newsprint, easel	K. Cowing L. Lippitt D. Edmundson
2:45	Internal dialogue exercise re: If I had to make the decision right now, what are the forces restraining and supporting my participation. Individual writes for 10 minutes, a script of internal voices. Small groups create a list of main voices on both sides		
3:10	Report out and discuss as a total group	newsprint and easel	L. Lippitt
3:20	Where do we go from here: in 2 weeks principal should have checked with his faculty, then send memo of interest, then 8 schools will be chosen and all notified of go or no go.		D. Edmundson
3:30	Opinion sharing sheet (to measure their interest and as a model for getting feedback from their staff.		K. Cowing

Beyond this detailed agenda it is worthwhile knowing: 1) how we described this project to principals in an introductory way at the beginning of the meeting; 2) what we listed as potential outcomes and requirements of participants; 3) the kinds of issues supporting or blocking their participation; and 4) the concerns and questions which principals had and our responses. These were important parts of start-up.

1. *QUEST Project Introductory Comments and Rationale*

Educators are being caught between the rate of change in society (manifested in increasing demands from the community for accountability, improved curriculum, implementation of new programs, etc.), and the school organization's ability to keep pace with these changes and new demands. Some symptoms of this situation such as increased student or teacher militancy, community dissatisfaction, high turnover of administrators and teachers, budget deficits, etc. are becoming more frequent.

In the past we have increased the input of resources to the schools to improve their ability to change and adopt and to provide good education. Finally, we have reached the point in most local systems, and nationally, where we cannot further increase the amount of resource input to schools. Therefore, we have begun to help schools and school systems to change themselves to better utilize the human and material resources we are presently putting into them.

Recognition of this need has led to the development of ways to help schools improve the process by which they achieve their task (or how they do it). These efforts are often called Organizational Development (O.D.). Typically the task or content dealt with by groups of educators, from school policies to curriculum revision, has been addressed with little concern for how the work is being done. How the task is attacked often determines success or failure, but this is often left to chance. An Organizational Development approach focuses on increasing the skills necessary for effecting improved organizational and group processes in each school.

Another pattern which has evolved is that of schools getting into the position of responding to crisis situations or of becoming *reactive*. For example, achievement scores need to be raised so some latest new idea (possibly individualized instruction) is implemented in a school. Typically, two or three years later a new innovation is desperately being searched for. To get out of this pattern a school needs to become *proactive*. This means learning to manage change rather than letting it happen to them. It means involving school personnel in identifying the changes they wish to make happen and to help them organize around the tasks necessary to make them happen. Our approach focuses on improving the *skills* necessary for these *proactive* activities in school personnel.

The QUEST Project has been based on an Organizational Development approach through team development, with an added dimension of helping schools to exchange ideas and resources and strategies which work. This sharing of resources enables the QUEST federation of participating schools to share resources, thus adding strength to the total effort and to each school.

As conceived, the QUEST Project provides resources for implementing the following objectives:

1. The development of skills and knowledge for staff teamwork in planning of programs designed for improvement of the educational process.
2. The development of skills in problem identification and definition.
3. The development of the skills and motivation for interpersonal support between staff members.
4. The development of innovativeness in classroom teaching and learning processes.
5. The development of innovativeness in administrative processes.
6. The development of skills of mobilizing resource persons and materials to maximize the learning opportunities for all students (including mobilization of human resource teams of aides, volunteers, older students, etc.)
7. The establishment within buildings of mechanisms and procedures for a continuing program of staff development and organizational evaluation.
8. The improvement of students' achievement levels.
9. The improvement of students' attitudes and self concepts.

(It is our belief, and a growing one within education, that objectives 8 and 9 will be the inescapable outcome if we can achieve reasonable progress on objectives 1 through 7.)

Inherent in these objectives is the development of a training program focusing on personal and interpersonal skills (in communication, leadership and planning) which builds a self-renewing climate for individuals and the organization. Central to these objectives and rooted in the QUEST notion is the development of a larger resource base for planning and implementing activities which support the Region's and possibly the larger District's progress toward self-renewal.

The desirable outcomes of programs like QUEST are sometimes not readily observable without paying special and close attention to the affective aspects of staff behavior.

After less than one year of training and planning efforts, we expect to see many examples of sharing ideas, taking action to make desired goals happen, improved communication and closer working relationships amongst teachers and principals, and the development and implementation of programs having been facilitated through involvement in QUEST.

2. *Possible Outcomes of QUEST* (from brief image of potential trip one year ahead by principals)

—Teacher and administrative personnel have improved small group leadership and organizational planning skills.

—Teachers beginning to add new behaviors to teaching styles which help children to establish priorities, make decisions, set learning goals, which create more open learning climates, and which improve student leadership skills.

—Teachers initiating cooperative attempts to reach unmotivated classes.
—Total faculties setting goals for school and implementing action plans.
—Teachers taking responsibility for own in-service days.
—School personnel establishing ways to share resources within and between schools...i.e., what works and doesn't, outside speakers, etc.
—Trained teachers becoming members of other project committees and increasing the likelihood of success due to leadership and planning skills.
—School personnel working together to solve problems.
—Teachers working with principals in a more open and trusting manner.

This is a sample of the "images of desired outcomes" generated by the principals in their brief trip into the future.

3. *Issues Supporting or Blocking Participation*

During the meeting, when the principals were asked to identify the various factors pro and con to participation, the resulting lists were constructed. Here are some examples.

Forces Supporting Participation	**Forces Restraining Participation**
Learning new methods of problem solving	Involved in workshops required
Open communication	Spring is hardest time to leave children and building
Team work of staff	Time
Input of experts	Resistance to change
Additional materials	Many teachers have low motivation
Positive attitudes of group	Many teachers feel there is too much time away from building or class
Positive attitudes of community	Negative attitude of staff
Region Seven input	Too many insoluble problems
Make a happier situation for children	Previous commitment for August
Develop leadership qualities in teachers	How to choose only two staff members
Develop skills within the staff to identify and resolve school problems	It will take more than two staff members to change some people
Improve community relations	Lack of time
Help teachers initiate movement for change	Selfishness—no desire to become involved
Have a supportive Region Seven Staff	Another project to waste time and solve no problems
Stipend	No one will see the project to completion
Opportunity for involvement	Commitment too long
Relief from normal teaching chores	Exhaustion of teachers and administrators
	Will team be able to change staff?
	Lack of interest

4. Concerns and Questions About the Meaning and Conditions of Involvement Expressed by the Principals in Their Small Group Sessions:

Question 1. What time commitments would there be for the building team?

Answer: As we see it now, we estimate the time as follows:
- — 3-day initial training session (March 1973)
- — 1-day follow-up support session (Two weeks later)
- — 1-day follow-up support session (May 1973)
- — 5-day further training session (late August)
- — Continued follow-up sessions (until January) for the team of 3–6 persons to meet in their schools regularly and implement meaningful action steps.
- — Also commitment to regularly scheduled periodic meetings of QUEST team representatives
- — Willingness to participate in the evaluation efforts.

This is subject to change as circumstances dictate and as the project participants modify it.

2. What does "continued follow-up" sessions mean?

   There will be additional 2-½ hour training sessions September 1973 through January 1974.

3. Are the 2-½ hour sessions released time or after school?

   This will be decided by the participating teams once we get together.

4. How in the world do you change attitudes which are strongly negative on the part of principals and/or teachers?

   That is going to be a central concern and thrust of the program....by getting them involved and working in the program, or, maybe by just letting them watch during this first year and keeping them informed.

5. What do you mean by team of 3 to 6 who will meet in their school?

   It is thought that each team will need to meet for planning, reporting and evaluation in their own school.

6. How much released time can we expect?

   We will schedule all the released time we can afford. Most of

the released time will be used for training events with all the teams present.

7. Where will meetings be held?

   The meetings that take more than one day will be held at a conference center. The one day or ½ day meetings will be held in a motel or at the Region Office.

8. How much time will be required for reading and research outside of the meetings?

   This will be an individual matter. Little or none will be assigned.

9. Can this be accomplished in such a large system as Region Seven?

   Yes. We will be working with little pieces of Region Seven to begin with (8 schools out of 24). During the second year we hope to add 8 more and so on.

10. What about the schools that aren't selected? Will they get anything out of it?

    Not much immediately, except hearing reports. We hope the program can be continued a second year so that they could join at that time if desired.

11. Who will replace principal and assistant principal in the building on March 13, 14, 15 (dates of start-up workshop)?

    There will be provision for substitute service if you wish to use a teacher or counselor in the office.

12. How will goals deal with racism and power elites?

    Each individual and team will establish priority goals for themselves. These topics would be very appropriate.

13. Can the assistant take the place of the principal?

    If we do not have eight teams headed by principals, yes.

14. How much outside preparation time is necessary?

    For formal training sessions—none. For planning activities in conjunction with the program, probably more than you spend in planning activities now.

15. Will the staff be paid for August sessions?

There is money in the budget for stipends—yes.

16. Can others join after this begins?

We hope to start with a full complement. Others will have to wait for another year.

5. *The End of the Meeting*

At the end of the meeting we asked each principal to fill out our "Opinion Sharing Sheet". This was done to give us a picture of where they were right now and to model a way they could get a reading from their faculties if they chose to. The responses are presented below, except for the open ended responses (For a copy of the instrument see Chapter 12)

Responses	Question
10	1. ( ) yes, I'm enthusiastic about participating
12	2. ( ) I see some value in our staff participating
8	3. ( ) It sounds like a good idea, but I don't think our staff is ready at this time
1	4. ( ) I have reservations about our staff participating
3	5. ( ) No. I don't think we should participate

6. *Team Identification and Formation*

This was a very interesting period and an anxious one for us. First, the number of schools actually sending a letter of intent to participate did not reflect the 10 principals who checked high interest. We had to do some extra encouraging and further explaining of the project in one-to-one and small group situations. Eventually we did get our 8 schools, but no one had to be turned down.

Secondly the social workers and psychologists, as they became aware of the project, submitted a letter requesting that they be able to send a team to the workshops. This was an exciting turn of events for us. It showed interest on the part of the pupil personnel workers. Their position in the system might enable them to develop a new consultant-type role for support of change within the system.

Third, the Superintendent, his two assistants and the Curriculum Director, agreed to form a change team. Thus we had 10 teams rather than 8 with involvement of special services and top administration. The potential of this multi-level participation excited us.

The actual team selection within schools happened in various ways, depending on the administrative style and philosophy of the principal. Some members were "volunteered" rather than asked. Some were consulted privately without going before the faculty. Some were representatives chosen after the total faculty had decided the school would like to

become involved. Some were chosen because of their positive assets as leaders. Others were chosen because of their negative or resistant posture. This meant we had people in varying states of willingness to participate, awareness of the type of participation expected, and understanding of the project goals as they entered the initial 3 day start-up workshop.

Start-up Workshop

To give a detailed account and documentation of this workshop would change the focus, complexity and length of this document drastically. Therefore we report the goals for the workshop, the general flow of events, and some sample product outcomes of teams.

The Workshop goals were:

1. That participants will have internalized some concepts relevant to understanding and leading groups and have practiced leadership skills.
2. That participants have a clearer picture of what QUEST is and how they fit.
3. That participants have a clearer picture of goals for self, team, and school.
4. That participants will develop action plans relevant to implementing their individual and team goals.
5. That teams will be built—norms for working together and communication and mutual support within and beyond teams will initially be established and developed.

The general flow of the Workshop was:

DAY I.

Morning: General introductions of who is in attendance, the staff, the goals of the workshop and project, and welcome to all.
Then getting to know each other in small clusters via some structured sharing activities and conscious attention to listening by use of a "Stop Action" process discussion period.
In addition, there was some work done on barriers to communication in groups such as this.
The morning ended with identifying and eventually sharing with the total community "What are the indicators or signs of a good day in our school?"

Afternoon: The afternoon was devoted to working in teams to identify priorities for each school team in order to develop action goals. These were shared across teams before the end of the afternoon.
The team building and functioning was facilitated by a

structured activity helping the participants take a look at the dynamics and necessary components of cooperation in task groups. It was also facilitated by the use of "Stop Actions", helping teams focus on such dimensions as influence, decision making and leadership dynamics emerging in their own teams.

Evening: The evening was spent sharing and clarifying values we all had about education and change, ending with teams and individuals comparing their stated values and the earlier stated priorities.

DAY II.

Morning: A lecture was given on Process and Content, illustrating how important it is to be aware of HOW we work to accomplish a task. This often determines success or failure.
Teams then began the task of goal setting. This began with teams developing a detailed picture of how they most wanted their schools to be functioning next year. These images of potential were shared (See Chapter 12 for the form we used).
Practice in communication skills took place as these images were shared.
Teams met to decide on their team goals. This began with each individual identifying what he wanted the team to focus on, then sharing these ideas and discussing them.
Skills of group leadership and group observation were practiced as teams observed each other at work and fed back their observations.
Learnings about behaviors which help or hinder group decision making were shared and discussed.

Afternoon: The Force Field Analysis was introduced as a helpful tool for deciding priorities and defining problems clearly. Internal dialogue was used to help team members identify ambivalencies about taking action on identified goals (See Chapter 12).
A series of Action Planning Steps was introduced as a guide in planning for action on team goals. Teams worked as consultants moved around to give assistance.

Evening: Participants were helped to look at their emotional styles of leadership and influence in groups via a structured activity.

DAY III.

Morning: The Planning Process was reviewed, along with other process learnings which would facilitate teams, and they continued Action Planning.
The Time Line was approached (See Chapter 12 for 2 examples) as a way to develop a specific calendar of events and specific responsibilities. Teams continued Action Planning and developing Time Lines.

Afternoon: Reality testing of Action Plans with other teams and consultants took place. Then time lines were revised and decisions and commitments to action made, then reported out.
Decisions about total project procedures and next steps were made and set by the total group.
The workshop learnings and concepts were summarized and the problems of re-entry into the schools were addressed.
Adjournment.

Results

Each team left with a specific goal and a specific plan for realizing that goal in their school. This was the major "product" of the workshop which each person went away feeling enthusiastic about. People felt something might happen after all. They also had personal goals for their own participation in follow-up efforts.

In addition, groups of teachers and principals and central administrators went away as teams, not just groups. And there was a greater understanding of what leader and member behaviors were necessary to facilitate a group.

In addition linkages for supportive relationships within and between teams had been initiated, and the purpose for QUEST seemed inherently clearer.

The phase of hard work within schools and of follow-up and continued support was next. The next chapter speaks to these concerns and procedures.

Chapter VI.

Supporting the Follow-Through On Plans and Commitments

The manner in which start-up is initiated, in any change effort, is important. But even a good start-up can fall by the wayside with subsequent frustration and guilt, unless there is a careful design for support during the risk-taking and implementation period. Certain norms and processes must be consciously supported and helped to develop and become part of the "normal" organizational processes. This phase of support for follow-through is a critical stage in any change effort. The weakest portion of most change attempts is this stage. We have seen many good ideas and projects go down the drain because the skills and initiative necessary for this stage of implementation were lacking. One of the greatest strengths of the QUEST project was its design for support. This chapter describes the design for support and followthrough, some of the critical components for this stage as we saw them, some of the difficulties of managing educational change, and some of the pitfalls.

Resistance to Change

As administrators, teachers or parents we have all experienced resistance to our change attempts and we all have a feeling for what is meant here. But let's spend a minute on the nature of resistance to change, before discussing its development and some of the means for preventing or decreasing it.

Some examples of resistance to change growing out of relations to administrators are:

1. A large number of teachers were given training in how to utilize small groups in a classroom setting. They liked the course and were eager to apply their learnings to their classes. The principals and superintendent found, however, that relatively few of the teachers were really behaving any differently on the job. They seemed to know their stuff but did not use it.
2. In one district office a new attendance form was developed which everyone admitted was shorter, more local and easier to use. Yet it was discovered that the teachers often omitted much of the data needed on the form, their speed of work decreased, and they objected to it on many insignificant grounds.
3. Then there is the one about the farmer during the TVA era. He assured the agricultural change team that he knew all about contour

plowing, crop rotation and the use of what he called "phosphate" for improving soil. He agreed that these were good ideas, "But, I don't do it that way," was his reply.

All resistance to change can be described as behavior which is intended to protect the person from the effects of real or imagined disruption of current familiar ways of doing things. It makes no difference whether a change has been made or not. If a person believes a change is about to take place, or has happened, they will behave as if the change has taken place.

Resistance to change may occur for an administrator when s/he attempts to create a change, and unintentionally creates many threats to the person(s) or group(s) with whome s/he works. The behavior many manifest itself in many forms. Hostility may be openly or secretly expressed. The aggression may be expressed towards the change itself or the administrator. There may be sloppy efforts to implement the change, fawning submissiveness, applepolishing, apathy, discouragement, or outspoken factions.

From the large and growing body of research it is possible to identify several universally agreed upon conditions which are conducive to developing active resistance to change:

1. If the nature of the change is not made clear to the people who are going to be influenced by the change, resistance can be expected. Partial or inadequate information is usually more fear provoking than the complete truth.
2. Different people will tend to see different meanings in any proposed change, so keeping the information ambiguous develops healthy resistance to change. One person may see the change as an indicator that s/he has been doing the job poorly, the next may see the change as an indicator that their position will be abolished.
3. Resistance can be expected if the implementers are caught in a jam between strong forces pushing them to make the change (i.e., from above) and strong forces deterring them against making the change (i.e., lack of necessary new skills or resistance from below).
4. Resistance can be expected to the degree that the persons affected by the change have pressure put upon them to make it, and will be decreased to the degree that these same persons are able to have input into the nature and direction of the change. We know that when humans perceive themselves as being exposed to what they perceive as excessive direction, they react in any one of four different ways: a) apathetic conformity, b) defiance, c) scape-goating, d) escape from the whole affair. We also know that human beings are more apt to throw themselves wholeheartedly into any project if they themselves have participated in the selection and planning of the enterprise.
5. Another way to develop resistance to change is to ignore any already established institutions in the organization or sub-groups within it. Any work group establishes certain customs. If one or

more of these are abruptly affected by an administrator trying to create a new state of affairs without some careful consideration and preparation, resistance will mobilize.

Similarly we have discovered some very reliable means for reducing or avoiding resistance to change:

1. Resistance will be prevented to the degree the changer helps those involved to develop their *own* understanding of the need for change and become explicit regarding how they feel about it, and what to do about the feelings.
2. Making certain that two-way communication does not break down prevents resistance. Negative attitudes will persist without communication in both directions.
3. Allowing people to blow off steam can be helpful. New attitudes can be accepted by a person if only s/he has a chance to thoroughly air their original attitudes. Punishment for resistance only increases resistance.
4. Resistance will be less likely to occur to the degree that the people involved participate in making decisions about how the change should be implemented, what the change should be like, how people might perform in the changed situation or other similar areas of activity.
5. Resistance will be less likely to develop if the facts which point to the need for change are gathered by the persons who must make the change.

With these concepts in mind, our next problem was that of developing a structure which would provide support and follow-through and reduced resistance to change as much as possible.

Providing Support for Change—Important Activities

In any change effort, such as a project aimed at changing specific practices or aimed at bringing about new organizational structures, start-up is half the job. It is a mistake, which many administrators make, to relax after a successful beginning and expect the initiated changes to automatically become part of the normal course of events from that point forward. On the contrary, there is at this time a tendency for "back sliding". At this time the new normalcy or homeostasis has not been established and things can easily "snap back". The new skills and procedures need to be practiced, improved, tested and modified. People have to become comfortable with and committed to the new procedures and ideas and possibly to some new values or attitudes.

Inside-outside coordinator:

A major component to the support effort, one which many of the other activities were built upon, was the establishment of the inside-outside

planning and consulting team. Quite often, as in this case, the necessary skills in planned change are not present within the system (though there is always the potential for learning these skills). Typically, this is solved by calling in some outside experts who work with administrators to plan the effort and then come back periodically or even regularly to assist through further planning meetings or staff training meetings, etc. The QUEST Project included these aspects. There was a planning team of 4 outside experts in organizational development who sat with the Superintendent, his two assistants, two department heads and a curriculum coordinator. This group developed the strategies, plans and time lines for action and implemented them. In addition one of the outside resource people in organizational development became an inside-outside member of the team. Behaviorally and organizationally this meant several things:

1. There was a QUEST office within the central offices which housed the inside-outside member of the team. He was physically present in that system.
2. The inside-outside member was contracted to be in residence 3/5 time or more if and when necessary.
3. This person often sat in on staff meetings, had lunch and coffee with other people in the offices, developed relationships with secretaries and other staff as part of his coordinator function.
4. He was often on hand to answer the phone and respond quickly to requests for help or other sorts of support. For example, he could volunteer to get materials ready for some of the change teams out in the schools by using the central facilities and his own time.
5. Eventually his role became more diffuse and he turned into an in-house organizational consultant. This meant helping in the planning or execution of staff meetings, working with administrators to develop strategies for involving specific staffs in planning and goal setting, helping in the design of special in-service activities, reacting as a colleague to letters, workshop plans and ideas with many people in the central offices or out in the schools.

These kinds of things don't happen unless there is a strong inside-outside component to the design. Within a year QUEST was steadily being woven into the fabric of the system, much more quickly than comparable change efforts lacking the inside-outside component.

Continued Training and Planning Time:

A second major component to our design for support was continued skill training and planning time. The first three-day start-up workshop focused on defining what QUEST was and could be, improving group leadership and planning skills and providing time for teams to set goals and develop plans. It was a residential workshop held in March. Two weeks later the first follow-up workshop was held. The major foci for this workshop were: (1) continuing the planning processes by helping teams to stop and look at what they had done and where they were going from

here; and (2) improving the change team members' skills in becoming consultants to their colleagues and developing participative styles of leadership and group management. The day went like this:

Morning: The morning was spent with activities which helped us summarize where we were for preparation for planning in the afternoon.
First we reviewed the 3 day start-up experience, then focused on sharing each team's path of progress. This included listing all the activities and events each team has been involved in while moving towards their goal. These were also coded as "upper" (success) or "downer" (failure) experiences. Teams then inspected their time lines to answer such questions as: Where are we on our time line? What is working? What is not working? What resources have we used and/or become aware of so far?
Between teams there was a general sharing and census regarding types of problems, blocks, and restraining forces which had come up.
After some discussion on the use of so called "failures" as a chance for learning and some possible strategies for responding to resistance and blockages, there was considerable time spent in identifying and practicing things that have worked and approaches which are helpful for staying in control and having influence.

Afternoon: The afternoon was spent in planning, based on current learnings, and making decisions, as a total group, about next steps for the total group of change teams.
The Administrative and Pupil Personnel teams made themselves available as resources to any of the school teams and each team took time to continue planning for activities through June. If one team had been successful with a certain intervention in their school, a member of that team was often asked to come and consult for a few minutes with another team, etc.
Before the workshop ended the group as a whole shared their new action plans and commitments. Then decisions for the future were made by the whole group, such as: (1) there needed to be a half day gathering in May, (2) that teams need to feel more free to utilize the inside-outside coordinator, (3) that there would be a longer workshop in August to prime ourselves for the new school year.

So teams went away with new ideas and having exchanged resources with each other, and they went away with new and revised plans, and

they went away with renewed enthusiasm and they went away with increased skills and they went away having participated in total project planning and decision making.

The second follow-up workshop was held a month later in June, before the schools closed. The goals for this event were: 1) to develop a sense of what is being completed this year in our QUEST work together (where we were—where we are now—changes we want to make); 2) to bridge the summer and look towards the fall; 3) to get indications of needs and desires for the August workshop. The day went something like this:

Morning: Time was taken to review the total QUEST process from the beginnings two years ago when Dr. Edmundson, the Superintendent, came to the external consultants and initiated the development of a proposal which became funded, leading to the start-up effort and the current follow-through efforts and the outlines for next year.

As a warm-up and a way to get evaluation data for planning future activities, an evaluation questionnaire was administered (see end of this chapter for this questionnaire and some of the results).

The staff then talked about changes they had seen and a general discussion involving all the participants ensued where changes were identified and listed, such as: "Our faculty has actually been able to focus on a problem this year, and the problem has improved"; "There is more expression of underlying fears and feelings and more open communication within our faculty"; "There is more unity and trust and a relaxed expression of ideas which didn't exist before"; "We are being more honest right here today than we ever have"; etc.

Individuals were given time to assess their personal change goals and how they related to the team change goals.

Then there was a quick feedback regarding the earlier evaluation questionnaire and information on the August workshop was shared and discussed and each team had some time to spend on whatever it needed time to do.

Afternoon: Some principals had planned with their teams to take a full day of released time. Those teams stayed during the afternoon and used the time and resources for further planning and organizing. This was optional.

This workshop gave us a chance to provide additional skill training and emotional support to individuals and teams. More important, it provided planning and thinking time during the paid day, rather than after hours. A pitfall of many educational change efforts has been to, by default, require

teachers to meet after school and not on "company time" if they want to do anything exciting or new. In QUEST we were legitimizing planning for change by making it part of the working day. But we did have to procure special monies via this Project to make it happen.

The next training event was the 5 day residential workshop, just prior to September school opening. The major focus was on developing plans for the new school year, further developing skills and developing momentum for the new school year. The specific goals were:

1. To provide further applied group dynamics and group leadership skill training as they related to work with peers and classroom learning settings.
2. To further develop individual and team goals and plans.
3. To continue team building and planning, including individual consultation and training in planning and assessment.
4. To continue practicing skills dealing with specific problems of resistance.
5. To share new ideas and innovations in education (for schools and classrooms).

Time and space does not allow describing this event in any detail, but the general design went something like this:

Mornings: were a time for short lectures on important concepts having to do with managing changes and group skills and for skill practice sessions related to specific problems or generally interpersonal and group relations and communication.

Afternoons: were broken into three modules:

a. time for focusing on each individual's goals and objectives and time to do whatever personal work seemed necessary.
b. time for working as school based change teams to do planning, get special consultation, to work on team relationships and organization.
c. time for cross team reporting and sharing and exchange of resources and ideas.

Evenings: were used to share innovations and inventions for schools and classrooms where individual teachers, administrators or special staff could share inventions they have been using in classrooms or administrative settings.

Several important changes were apparent by the close of this 5-day workshop. Some new organizational precedents had been set and a lot of energy for improving education had been mobilized.

First, the change teams had been given time and help to become well organized. They had taken time to look at how they were operating as a

work group and had developed very specific action plans and time lines for the school year with personal commitments to action. In addition, people became enthusiastic and energized because they had a sense that success was a real possibility. Part of this perception rose from the fact that the principal and teachers on each team had discovered much in common (concerns, ideas, priorities) and were excited about their ability to work together rather than be suspicious of each other or at war.

Second, a structure of cross communication and sharing of ideas and resources established between teams had been developed. People on one change team felt very excited about just being able to pick up a phone and ask for help or to offer resources with people of another change team. For example, if a teacher was good at something, another team used that person as a resource for a few minutes in their own planning, or the fact that one school was bringing in an inservice resource became knowledge for other schools. An informal coordination and pooling of resources to bring in resource people for inservice activities throughout the school year sprang up.

Third, teachers and principals realized that many of the "small" techniques they had invented to make themselves a more effective teacher or administrator were not something everyone else knew and took for granted. By encouraging and taking time for this kind of sharing and documentation of these "inventions" an enormous amount of resource was unleashed within the system.

Finally, time was spent focusing on personal life planning and personal needs, not just team or group needs. When we were focusing on planning for change in schools it was easy to forget where each of us personally fit and what each of us personally wanted. (For this reason the personal focus was probably the hardest precedent to establish.) On the other hand, it was the most important place to start. Unless personal needs as well as groups needs are being met, the individuals, necessary to make up the group, will not be as committed or as productive in their participation. The official training activities and meetings for the rest of the year consisted of a principal's meeting later in the year and a meeting of "Documenters" who were the school based persons involved in the evaluation efforts for the project. Then finally, in the Spring, there was a summary and review meeting for one day involving all teams. The focus was on sharing successes and failures, conceptualizing the planned change experience, and future directions for each team.

Change teams:

In addition to the inside-outside coordinator and the training component, there was another important structure included in the project design for support. Change teams were central. An important aspect of the change teams is that the Principal had to be a member. Each member was there voluntarily. The goal of change teams was to develop skills and strategies which would involve their colleagues in initiating and planning for change, rather than planning the change for them.

These teams were encouraged and helped to meet regularly on their

own. Support was given in the form of special released time or permission to rearrange schedules during the day so a team could get together during the day whenever possible. Many times meetings were held after school and the coordinator or other administrative people were often on hand to offer support and encouragement.

Organizationally, these teams were the interface between the new planned change technology, concepts and skills being fed in and each of the schools, and including the central administration. It was important to place most of our support and energies at that point.

At-the-elbow Support:

Another part of our design for support of change was the concept (and practice) of "at-the-elbow" support. The notion was that support for change at workshops was crucial but not necessary and sufficient for success. It is usually too long between training sessions to provide enough to teams who are working daily at the point of interface within their school. Teams and team members develop the need to reality test plans, for a meeting with their faculty, with a resource person. They need to be able to call up to talk about a success which they are excited about or a failure they are disappointed about. Teams also need planning help along the way at their regular meetings. And teams need help in looking at their own procedures and work together as a team. These kinds of needs were met by the constant availability, upon request, of the inside/outside coordinator to any team or team member. This included helping to plan, staff and evaluate inservice events put on by any team in their school. In a very real sense this person became an internal organizational development consultant available to the change teams, in much the same way industry has organizational development consultants available to their departments and sections within a company.

The results were that teams were helped to function by receiving their own inservice supervision between training events. This resembled a field supervision component which complemented the regular training events. More importantly, teams were nurtured, not left to sink or swim, between the periodic training events. During the second year, this was the major contact and mode of support given to teams. This "at-the-elbow" support didn't prevent problems, but it did keep them manageable as the project progressed.

Special Problems of Providing Support

Many staffing and organizational patterns do not reflect the need for staff support on the job as a person and a professional. This makes it hard to begin doing more supportive things. First, there are no precedents and models to follow, and secondly, it often means changing old norms and establishing new ones. This in itself is a change activity which may meet with resistance, and to implant new norms, may require the acquisition of new skills.

In the implementation of this project we discovered several special problems of support which had to be overcome. We want to share these on the basis that this forewarning may be useful to others.

Lack of time:

The old "lack of time" problem manifested itself in several ways. Teams began to find that there was no time to meet either during school, due to teaching load, or after school, due to all their other commitments. Another manifestation of the problem was that it became hard to get everyone together because people's "free time" did not coincide. In addition, it was hard not to feel overwhelmed by everything else which had to be done day in and day out and therefore become immobilized at times. In the initial stages of the project, some people began to wonder if, or even feel like, this QUEST thing was just one more meeting which they had to attend.

There was no one best answer, but several things seemed to help. Sometimes it was important to help the change teams pause and look at this as a problem of priorities. Sometimes it was possible to relieve individuals of one other responsibility, or to abolish the responsibility as a priority decision. Sometimes individuals were allowed to take less responsibility as a team member, or even to decide that withdrawal was the only rational solution (which did not happen frequently). As a preventative measure, membership on the change teams had been established on a voluntary basis.

There seemed, also, to be a norm that planning time happened after school or on your own time. Sometimes we had to alter this by brute force. This was accomplished by making project monies available to release all the members of a team who had teaching responsibilities for a two hour block during a morning or afternoon of school time. This did a lot, where we used it, to demonstrate the importance attached to QUEST by the central administration and project staff.

Lack of utilizing project resources:

This problem manifested itself in several ways. Teams fell into the habit of not asking the internal coordinator for help or for time to talk about how it was going. Somehow it was not legitimate to ask for the time. Other more important things (whatever those were) should be the focus of his time. There was also the problem of not having utilized this kind of resource before. There was some skill deficiency in this area. In addition, there was the usual problem of helping the teams to understand just what the scope of project resources were and of modifying the project in ways that provided resources which teams needed.

Several things were tried and seemed to help. The coordinator began to systematically check with each team and ask to be invited to their meetings (which they felt he might be too busy to do). The coordinator also went around to the schools to chat with the principals or team members who were free during that hour. During the training workshops some

attention was paid to the skills of utilizing resource people, especially the coordinator, and just listing all the ways the coordinator could be used. The fact that the coordinator was intimately involved in the ongoing experiences of each team enabled him to become an effective bridge between resources that had been set aside to implement the project and what the participant needs were. This greatly facilitated the process of making the resources really available to teams.

Lack of Coordinator time:

This problem partly reflects the fact that the inside-outside coordinator was involved 3/5 time. Other activities which took his time and energy away from the project created more of a load for him. During periods when the project needed one or two weeks of continued or intense work it was available. This was very important.

Resistance to Returning Saviors:

The fact that some volunteers have been taken out of a system and been subjected to a new and energizing experience often gives rise to resistance or resentment on the part of others in the system. This sometimes happened. It happened most when teams returned to their school in less skillful ways, or where there was a lot of suspicion to begin with.

In these cases it was paramount that the inside-outside coordinator was avilable to sit with the teams and give emotional first aid, help them to learn from the experience, and to help them alter their approaches. At-the-elbow help became essential during these experiences.

Same Old Administrator Behaviors:

After the initial wave of training and enthusiasm had passed some people complained that administrator behaviors (those involved in the training like principals and central administrators) were the same old ones, during meetings, instead of changing in ways the person wanted or in ways the training might indicate. This reflected two things: 1) the administrator's own inability to change as fast as others wanted, or 2) the complainer's own ambivalence in changing some behaviors or in trying out some new skills.

This was handled in several ways. Sometimes in was sufficient to listen to the concern and talk about it. At other times it was important to help the complainer give the feedback, in a constructive way, to the appropriate person. Or it meant helping the complainer to develop some empathy for how hard it is to institute new behaviors and to develop ways to help themselves and that other person in this enterprise.

Pitfalls in Providing Support for Change

When we became highly involved in the implementation and success of

this project we discovered some pitfalls that are important to note. We have listed the pitfalls which we became aware of.

1. It is easy to think of the inside/outside coordinator's job as a part time position. This could be a mistake. To see it an additional responsibility to an existing position would be unrealistic.
2. It is easy to become impatient and to begin planning for others in the project rather than taking the time to plan with everyone who is involved.
3. When providing support to individuals and groups it is easy to become spread too thin and become distracted by all the small emergencies which come up. In relation to this it is tempting to forget to stop, think, reassess, and get support from each other.
4. When providing support to teams which are bumping up against brick walls, it is easy to become despairing and lose one's ability to listen and be supportive. This can even lead to avoiding contact with the teams or schools that are having the toughest time.
5. Another danger is that of getting into the position of providing the leadership during team meetings when you see the need for it, rather than helping the team to develop their own. Providing helpful leadership for teams from time to time is a fine line to tread between creating dependency and fostering independence.
6. When the inside/outside coordinator becomes a recognized resource within the system, persons not directly involved in the project begin to make requests for help and consultation. On the one hand it is important to respond positively to these expressed needs. On the other hand it is a real pull to branch out and become spread too thin and to become involved in "all" the problems of the system.

Summary

In this chapter we have discussed what may be the most difficult and complicated, yet most crucial phase of any change effort. The support and follow-through phase is where many change efforts can fail. One of the major concerns during this period of activity is that of successfully dealing with resistance to change and the various pitfalls which occur once things have been started up.

When implementing the support and follow-through phase of any enterprise it is important to have some understanding of the dynamics and nature of resistance. The most successful strategy is to respond out of a problem solving posture rather than becoming impatient and pushing harder or becoming involved in planning *for* rather than *with* the people involved in the change. It is also important to realize that this support and follow through phase is a complicated one and requires many and varied skills, both to be truly supportive and to be able to deal successfully with the inevitable pitfalls.

The behavior of the support agent is crucial at this stage. Below is a short review list of some of the more important skills and behaviors:

1. Being really on call, not too busy, and with a secretary to take messages.
2. Not waiting to be called, but making dates to get together informally, over the phone, or at training events.
3. Getting out to visit teams in their settings frequently.
4. Counteracting the perception of others that your time is too valuable to spend it helping or talking with them.
5. Pushing people to keep informed of all their activities and meetings.
6. Recognizing and acting on the principle that the support person also needs to get his or her support regularly.
7. Recognizing that becoming impatient, judgmental and advice-giving can become counter to giving support.
8. Being able to relate supportively to other parts of the system without spreading too thin.
9. Becoming an inside/outside coordinator which means being housed internally and available for many and varied personal contacts.

We have taken the time to reiterate, above, some of the most important activities of the coordinator because this person's skills provide the backbone of the support and follow-up phase. Furthermore, if failure occurs at this stage of the enterprise, the momentum and maintenance of change are unlikely to develop, and one more collective failure will be added to the storehouse of frustration, guilt, and sense of futility.

Sample of Feedback on May followup Workshop

FEEDBACK FOR QUEST*

Staff and Region Administration Staff
May 22, 1973

Team_____

Feedback for May QUEST Meeting:

THE PURPOSE OF THIS FEEDBACK TOOL IS TO GIVE FEEDBACK AND GUIDANCE:

—for the planning of future training events;
—for the team-support activities of Larry Lippitt and HRDA Staff;
—for improvement of role function of the Region 7 Administrative leadership;
—for the use of building teams and individual team members to improve their functioning.

Support activities;

1. Three phrases I would use to describe Larry's support role in the

*actual space for writing has been reduced to save space

QUEST Project,
(a) with team:
(b) with individuals:

2. Some particularly helpful things I have observed Larry doing have been:

3. I wish we could have more of:

4. In my opinion, we need less of:

TRAINING ACTIVITIES (HRDA STAFF):

1. The training events thus far have been helpful in the following ways:

2. The kinds of training I feel our team needs more of are:

3. The kinds of training I personally feel the need of are:

BUILDING TEAM:

1. Phrases I would use to describe my team are:

2. Phrases I think my colleagues in the building would use to describe our team are:

3. The most important problems we need to do something about in our team functioning are:

4. My feelings about participation in QUEST, regarding long range potential payoff, are thus far:

Highly Optimistic	'Optimistic	Neither	Pessimistic	Quite Pessimistic

5. My feelings about progress we have made thus far:

Quite displeased Unsatisfied	Displeased	Neither	Pleased	Quite Pleased and satisfied

6. My personal feelings about our team's "teamwork" are:

Highly satisfied	Satisfied	Neither	Dissatisfied	Quite Dissatisfied

ADMINISTRATIVE STAFF:

To me, the most important strengths of the superintendent's role are:

1. I have observed the administrative staff being supporting in the following ways.

2. Kinds of support from the administrative staff that seem to be lacking or that I would like more of are:

3. In the leadership of the QUEST Project for Region 7, I would describe the style of the superintendent as:

4. Two recommendations for strengthening his leadership, from my point of view, might be:

GENERAL:

1. List some of the possible "payoffs for students" that you see growing out of the QUEST activities and projected plans.

2. What do you see as potential "payoffs" for the total building staff, growing out of the QUEST Activities and projected plans:

3. The most important values to me of participating in the QUEST Project, so far, are:

Sample of responses

(Page 1, #3) *I wish we could have more of:*

Listening exercises—feelings—empathy (some members could improve group skills if they understood what was being said). Setting calendar dates for progress to be made "time table."

Individual contact with Larry—rather than just a "hi" while passing in the hall.

An instrument that would allow for periodic review and evaluation of the QUEST project at each individual school; I think that a periodic evaluation of the team's activities and experiences in their schools and with their staff members should occur and be forwarded to the region office.

Ways of drawing people out—i.e., the puzzle.

Written materials to hand out to the staff at school explaining what QUEST is about and the philosophy behind it. Techniques for the entire staff to see and absorb on group consensus, etc. Real live gut role-playing with Larry and Ken operating a simulated faculty or community meeting.

Individual help to each team once they are back in their school.

Larry in on seeing what is really happening.

Interaction with other schools and individual not already known.

Consulting skills—activities to help us look at our decision making processes and commitment to learnings gained from the activities: i.e., "We will do it this way back home too!"—The validity of two-way communication—Decision making skills.—Group on group stuff.

Men like Larry and Ken. When they are explaining it seems simple, easy and understandable.

Team work-time.

Time. Clerical service.

Release time for planning and better communication between QUEST and individual teams.

Some specific consultation on new effective trends in junior high schools. Some method of changing attitudes of unchangeable teachers. Some method of helping teachers to demonstrate their belief in the work and dignity of humans, including students.

I would like to see Larry in the individual schools, so he would know us better.

Action.

Group games, or group interaction activities,—they really make you think and evaluate yourself and others. Would like to learn a few and work them on staff.

Time with Larry "on board."

Innovative group activities. And more time given at school to work on activities to promote our program.

Simply "time". Many details are now floating in space, proposed, but not utilized—fragmentation of P.P.S. team has resulted in losses in communication.

Rapport with staff. Rapport with team members. Truly "Open" communication. Often there seems to be an undercurrent that can lead to divisiveness rather than teamwork.

More time in school (QUEST team work be a duty so a better job can be done)

In school meetings.

Larry talking to our whole staff.

Intergroup activities.

More time to review, analyze, plan.

Time in our school to work with the entire staff. Larry's assistance at staff meetings.

Small team meetings with Larry.

Discussion of the two forces and how to eliminate the negative forces.
Time to work on materials.
Change to observe individualized classrooms.

The kind of cooperation and desire on the part of some members on the team. It is difficult to function as a team with opposition so evident.

Staff participation included in the QUEST meetings. Inviting other staff members to our regular meetings.

(Page 3, #4.) *My feelings about participation in QUEST*, regarding long range payoff, are thus far:

Highly Optimistic (6)	Optimistic (23)	Neither (3)	Pessimistic (5)	Quite Pessimistic (0)

Chapter VII.

Developing The How-To-Do-It Skills

The history of efforts at innovative training and experimentation in educational systems reveals evidence that much of the learnings, knowledge, goals, and good intentions which are generated by inservice training never become actualized in interpersonal or classroom or administrative practices. Good-will, a cooperative spirit, and the desire to grow, improve, and change is a starting point; but without the skills to implement one's positive "images", they become haunting reminders of failure and potential seedbeds of despair and guilt.

Most proposals for educational improvements contain high hopes and reflect the authors' longings that something good will emerge as a result of funding and implementation. Too often this does not happen. The QUEST design contained built-in support that *changes would take place* within the system because of the focus on developing the skills and supports necessary for effecting individual and organizational change....thus enhancing both the risk-taking confidence and the resources for success within groupings, teams, and schools.

Knowing that "A good intention is only as strong as the skill to carry it through", a key issue and major thrust for the designers of the QUEST Project was the emphasis on actual Skill Development, Skill Practice, Feedback, and Re-Practice—necessary to develop the behavioral skills needed to implement and carry through the good ideas and intentions generated by the participant teams and individuals. In our opinion it is a real "trap" to motivate persons to change, and encourage them to adopt risk-taking behaviors, without first equipping them with the necessary conceptual and behavioral skills for coping with problems of implementation and the subsequent reactions to their change-efforts. We view such "half-way support" as an ethical issue of unprofessional practice on the part of trainers and consultants.

The design ingredients for QUEST training events were carefully selected for 1) relevant social science content, 2) Skill Development (immediate and potential) relevance, 3) Transferability for "back-home" application, and 4) Continuity-linkage to subsequent training experiences. The Design Team maintained a high commitment to providing for the acquisition of conceptual and behavioral skills which would facilitate team-building and helpful group/team interaction in the classroom and school building.

Whenever possible, workshops and other training modules included time for: 1) Developing skills, 2) Practicing skills related to actual problems and on-the-job situations, 3) Feedback from team members (colleagues and staff), 4) Re-practice of alternative behaviors, utilizing the learnings from the feedback received.

An additional support-feature of the design was providing for periodic "support" workshops where issues generated by the ongoing work could be worked on with the QUEST Staff Coordinator and other staff members who provided "at-the-elbow" help upon request. In all these ways the QUEST Project design provided for constant reinforcement and support of previous learnings....as well as new skill development as it was needed.

The original QUEST proposal contains nine stated objectives which constitute a broad outline of the knowledge and skills needed by participating teachers and administrators in order to carry out the objectives of the QUEST Project on a day-to-day basis. These objectives are:
(In order of priority)

1. The development of *skills* and knowledge for staff *planning* of programs designed for improvement of the educational program.
2. The development of *skills* in *problem identification* and definition.
3. The development of the *skills* and motivations for *interpersonal support* between staff members.
4. The development of *innovativeness* in *classroom* teaching-learning processes.
5. The development of *innovativeness* in *administrative* processes.
6. The development of *skills* of *mobilizing resource persons* and materials to maximize the learning opportunities for all students (including mobilization of human resource teams of aides, volunteers, older students, etc.).
7. The establishment within buildings of *mechanisms* and *procedures* for a continuing program of *staff development* and *organizational research*.
8. The improvement of students' *achievement levels*.
9. The improvement of students' *attitudes and self concepts*.

Expanded slightly, these objectives become a basic checklist of "how-to-do-it" skills for a participatory program of leadership development and organization renewal, with special focus on individual growth and group/team interaction.

Our central strategy throughout the QUEST Project was a training program which focused on personal and interpersonal skill development for individuals and for team groupings, in these areas:

1. Skills in initiating change
2. Communication skills
3. Interpersonal and group leadership skills
4. Planning skills

The plan was successful in leading to the establishment of a continuing program of staff development, including support sessions and procedures for continuous evaluation and feedback to individuals and teams within each building. As this happened, a self-renewing climate for individuals and for the organization was created, and many in the system, including the students, began to benefit.

Our master plan for Year 2 of QUEST included a fifth area, the Skills of

Designing Participative Learning Experiences, for a selected group of participants who indicated special interest in continuing their development as leaders-in-training with the skills of designing learning experiences. This group would have comprised the "cadre" of leaders for Round II of QUEST. (At the end of Year one, 30 persons had expressed interest in this advanced training and indicated their willingness to invest significant amounts of time and energy to participating in future training-of-trainer events).

Rationale and Assumptions Regarding Skill Development:

1. Experience suggests that external consultants create dependency unless the skills of effective functioning are taught to people within the system. Even then it is often difficult for the system to keep from "slipping back".

2. In the traditional system of self-contained classrooms, most educators have carried out their roles in relative isolation. Many potentially valuable innovations have not been shared due to issues of competition, lack of recognition, and ineffective communication. Increased interpersonal communications skills of school personnel will facilitate the sharing of successful practices and improve the quality of education.

3. Most people want change and, when change is desired, it is typically more effective to influence persons as members of small groups than in an isolated individual-by-individual manner. With larger staff groups this may involve breaking the total group into sub-groupings (teams).

4. The skills of democratically involving people (i.e.: consensus decision-making, brainstorming, etc.) are crucial because persons who associate with one another under conditions of equality are more likely to share with one another, to utilize their abilities creatively, and to have a more positive attitude toward self and their school or organization.

5. The skills of involving others in planning and decision-making are crucial, because if the small group's activities and tasks are imposed from outside, the norms set by the group are likely to be limited in character. If they are determined from within, they are more likely to take on the ideals and goals of the participants, and therefore will be supported and implemented more openly and freely. Persons are more apt to throw themselves wholeheartedly into a project if they themselves have participated in the selection and planning of the enterprise. On the other hand, if an experience is characterized by excessive direction and little or no reciprocity of influence, the human response may be: apathetic conformity, defiance and sabotage, scape-goating, or escape from involvement psychologically and/or physically.

6. Developing skills in goal-setting and implementation is crucial to developing the existing potential of strong leadership in schools and classrooms because groups that determine their own activities tend to have active leadership, while passive leadership characterizes groups whose activities are externally imposed.

7. Influencing and expanding the skill repertoire of teachers and admin

istrators is vital to the experience of children in the classroom, because the learners' style of learnership is influenced by the styles which he or she experiences from significant persons.

Communications Skill Training for QUEST Teams

During the initial start-up training for the QUEST teams, special emphasis was placed on communications and teambuilding skills. The purpose was to give teachers and administrators knowledge and skills that could enhance their own face-to-face communication, make them more aware of their individual and unique style of communicating, learn about the group and organizational factors that affect communication, and practice the skills that improve one's ability to communicate more effectively with others. They learned and practiced skills like:

1. How to assure understanding by paraphrasing what others are saying by giving back the meaning of their statement.
2. How to listen effectively for 'feeling' and meanings, as well as words.
3. How to describe behavior which enables others to identify and recognize specific behaviors to which an individual is responding.
4. How to check one's perception of others' feelings or intentions.
5. How to identify non-verbal communication cues.
6. How to apply guidelines to giving and receiving feedback.
7. How to identify the effects of expectations in communication.
8. How to describe, as distinguished from expressing, feelings.
9. How to identify the norms of groups and organizations.

When the total group of QUEST participants met together for the first time at the 3-day "Startup" Workshop, the startup design itself gave the participants opportunity to practice several communication skills. As they entered the room they each received a large card (5 x 8 in.) on which to record the following information: (see illustration).

NAME (I'd like to be called by):

THE PLACE I'D MOST LIKE TO LIVE IF I COULD LIVE ANYWHERE:

TWO THINGS I'M GOOD AT:

THE AGE GROUP I TEACH OR WORK WITH:

THE AGE GROUP I MOST ENJOY TEACHING OR WORKING WITH:

SOMETHING I WANT TO GET BETTER AT:

WHAT I THINK OF WHEN I HEAR "QUEST":

After recording this information on their card, they pinned it on as a nametag and selected another person (preferably someone they didn't know very well) to interview about the information on the nametag plus any additional information they needed in order to introduce the person briefly to the total group later on. After each person had interviewed (and been interviewed by) their partner for about ten minutes each, they were given two 3 x 5 in. cards of different colors....on one card they wrote "My hopes and expectations for this workshop," on the other card they wrote "Concerns and anxieties I have about this workshop." They were told not to sign their cards, so each person could be as open and candid as possible in sharing where they were....this information was later collected and shared collectively with the total group and served to create a norm of openness for sharing what you were thinking and feeling at a given moment.

During a reflection period later in the day, many individual insights and learnings were shared in retrospect around the information, feelings, non-verbal cues, and other communications that individual persons did or did not "get" as they started. This experience, and the consequent debriefing discussion, made a significant impact on the group as a whole. They were moving toward openness and sharing through practicing communication skills.

A second experience which provided significant learnings, both individually and collectively, in the area of communications, was the "Choo-Choo" activity which deals with effective listening and paraphrasing (giving back the *meaning* of what a person says to you) to insure understanding.

Imagine that you are there as we describe it in the present tense. The entire group is seated in two concentric circles with their chairs side-by-side facing in opposite directions (e.g.: the inner circle of chairs is facing clockwise while the outer circle faces counter-clockwise...as though you are seated beside a person on a train next to them, but facing in the opposite direction. For clarity of directions, we will designate participants in the outer circle as "A" and participants in the inner circle as "B".

Every person has previously written on a card a brief statement of something they strongly believe (in this case it was focused around education), e.g.: "Something I strongly believe about education, or my role as an educator is.....". The statement should be as *specific* as possible. Not broad and general!

When everyone has written their statement, they take places in the circle(s) and person "A" in each pair reads his statement to his partner, person "B" who is seated next to him.

"B" then repeats back to "A" what the *meaning* of the statement is to them. When they do this they are *paraphrasing* (e.g.: "giving back the *meaning* of the statement as they understand it).

"A" *listens* carefully to the paraphrase, *without comment*. When "B" has completed his/her paraphrase, "A" can reply in one of three ways: 1) "Yes", 2) "No", or 3) "Partly". If, indeed, "B" has understood and clearly reflected the complete meaning of "A's" statement to "A's" satisfaction, then "A" replies, "Yes".

The pair then reverses roles and the "listener" becomes the "reader" and shares his/her statement with the partner and they continue the same process until the meaning of their statement is conveyed and paraphrased. When both "A" and "B" have paraphrased each others' statement and reflected the meaning of it to the other's complete satisfaction, one of the pair remains seated while the other moves forward to the next empty chair in their circle, both persons have a new partner, and the process is repeated....usually six or eight times, so that each person has a number of partners and, therefore, the opportunity to practice listening and paraphrasing a number of times.

IF, on the other hand, "B" *does not* paraphrase (give back the *meaning* of "A's" statement to "A's" satisfaction) "A" answers, "No", and "B" tries again! "B" may ask "A" to re-read the statement as often as s/he wishes....each time trying to understand more completely and grasp any meaning that s/he is not perceiving.

IF, "B" is paraphrasing a *portion* of the meaning, but not the entire message which "A" wishes to convey, "A" replies, "Partly", whereupon the "listener" may try again, or ask to have the statement repeated.

Comments on this design:

This activity adds enlightenment, insight, and a degree of 'liveliness' to any group. We have had very positive experiences with it. Most persons are amazed at the difficulty others have in grasping what they perceive as a simple, though often a profound, statement! This is because most of us think if we *believe* something very strongly ...others will somehow intuitively know what we mean. Most of us have said to someone, "You KNEW I didn't want you to do that!" Of course the truth was, they didn't know it at all, but because we felt strongly about it we took it for granted that they knew exactly how we felt and what we were thinking. The fact is that much of our communication with others "misses" a great deal of the time.

This exercise sets a norm early in the life of the group that it is O.K., indeed, it is *desirable*, to paraphrase what another person says, in order to check whether you understand the *meaning* of their statement. Paraphrasing is really a compliment to the other person....it is saying, "I care enough about you and what you are saying to check and make certain I understand what your message really is."

Another learning from this exercise for participants is that even written statements tend to be unclear. They become aware of the need to be more clear and/or concise in their communication, especially after several persons have had considerable difficulty in grasping the meaning of their statement.

This exercise can sustain group interest for at least 30 minutes...and often longer. The leader can participate or not... it is helpful to have someone to keep individuals moving on to the next open chair, especially if you sense a couple have finished their transaction(s) and are just "pastiming." It is helpful to have several empty chairs in the circle for persons to move into when they are through with a partner; this makes the need for a new partner more apparent to others who may be ready to move on. Also it is helpful to coach participants, when giving directions, "not to let their partners off too easily...(e.g.: don't say, "Yes" unless they have really given the full meaning of your statement back to you!)

After 30–40 minutes of this activity, it is important to have a "debriefing" of the activity during which individuals share out their experience and learnings. The leader can then suggest that we practice these skills in our subsequent interactions with one another. It is helpful to refer back to this experience during future sessions, to keep it relevant to the group.*

Group Leadership Skills for QUEST Participants

Each of us has spent most of our life in groups of various kinds: our family, gang, team, school classes, work groups, etc., but rarely do we pause to observe and/or think about all that is going on in the midst of a group activity, e.g., why are members of the group behaving the way(s) they are? Why can't we get any work done...or make decisions? What kinds of leadership skills are needed to facilitate the group's interaction(s) and movement from one task to another?

During our five-day Workshop in August 1973, a portion of each day was devoted to Group Leadership Skill Training and Applied Group Dynamics. These sessions included both conceptual didactic presentations and actual Group Leadership "skill practice" of simulated on-the-job problems and real life situations. For example, these included:

Awareness of Task and Process in Groups: Groups function on various "levels." If we are to improve our effectiveness in groups, we need to understand what these "levels" are, and what is happening because of them. (See Chapter 12, Exhibit XXX "What Goes On In A Group"). Time was spent on understanding and identifying specific "Task" and "Maintenance" behaviors in the group.

Identifying Norms in Groups and How to Change Them: A norm is a pattern of behavior that develops in groups. A norm exists when most people in a group do a particular thing in a particular way, because they have come to expect each other to behave that way. The groups practiced identifying and clarifying their norms.

Developing and Maintaining a Climate of Trust, and Support: An in

*More material on Communications Skill Training, including specific designs for group skill development as developed by Northwest Labs Regional Educational Laboratory, is available from XICOM Corp., RFD 1, Sterling Forest, Tuxedo, New York 10987.

valuable group leadership skill is being able to develop and maintain a climate of trust and support in a group so that group members are free to be open in their responses and interaction with one another. This climate allows for openness, experimentation, and creativity. It does not permit "cutdowns," "killer-statements," or the use of humor as a control-mechanism toward others. Leadership skills were practiced with feedback and re-practice.

Decision-Making, Styles and Procedures: Groups are making decisions all the time, some of them consciously and in reference to the major tasks at hand, some of them without much awareness or relevance to group procedures or standards of operation. It is important to be aware of how decisions are made in a group in order to assess the appropriateness of the decision(s) and to evaluate whether the consequences of a particular decision-making style are really what the group members anticipated or desired. We observed and diagnosed four decision-making methods or styles:

1) Leader-dominated, "I think we should...does anybody object?"
2) Majority Vote, "The Ayes have it!"
3) Polling the group, "Let's see where everyone stands, what do you think?"
4) Consensus Testing: genuine exploration of alternatives, testing for opposition, willingness to compromise, and sufficient agreement (not necessarily unanimity) to be able to implement a decision.

Through discussion, reading, staff presentations, and small-group skill-practice workshops, participants developed increasing insight and skill(s) in:

Identifying and Coping with Basic Issues and Problems in Groups such as:

1) *Identity:* Who am I in this group? Where do I fit in? What kind(s) of behavior is acceptable here?
2) *Goals and Needs:* What do I want from the group? Can the group goals be made consistent with my goals? What do I have to offer the group?
3) *Power, Control, and Influence:* Who will control what we do?
4) *Intimacy:* How close will we get to one another? How personal? How much can we trust each other? How to build greater trust?

Planning Skills for QUEST Teams

Just as "Knowing where you are going is half the journey..." knowing and utilizing the skills of planning accounts for more than half the success of most effective training/learning experiences. Throughout the QUEST project, the concept of planning, evaluating, and replanning on the basis of the evaluation feedback was stressed. Whatever the occasion, or event (e.g.: building-team meetings, evaluation sessions, workshops of various

lengths, staff sessions, principal's meetings, cross-team consultations, personal and team support-sessions, etc.), the focus was on PLANNING to insure a significant and helpful training/learning experience for participants. We estimate more than 500 meetings were held during the year.

The planning sequence which was utilized most consistently and with marked effectiveness is:

1. Goal setting (using images of potential trip into future)
2. Prioritizing (clarifying value criteria for goal priorities)
3. Force field analysis (barrier and supports for movement)
4. Action steps alternatives (brainstorming all possibilities)
5. Time-line development (stepwise action plan)
6. Evaluation plan (plan for getting feedback from action initiatives
7. Anticipatory practice (role-playing and other skill development simulation)

This flow can be used for planning sessions in most settings, providing a participative experience with high payoff for everyone involved.

Our approach to planning and goal-setting is based on a series of assumptions:

—That people who are interested in and who will be affected by decisions for action and commitment should be involved in making such plans;
—That images which lead to action must be realistic and do-able;
—That projecting images and planning for action are more realistic and useful if they are based upon an understanding of the system by "insiders" working together with "outsiders" ...thus creating inside-outside planning/consulting teams.
—That people need to project toward something rather than to focus on getting away from pain or problems. (The latter leads to feelings of depression and impotency while the former maximizes hope, possibilities and potentialities.)
—As people work, talk and brainstorm together, they build on each other's ideas and increase their usefulness.
—That an important way to enlarge the range and scope of problem-solving is to seek a variety of alternatives, both images and action ideas, rather than to focus prematurely on one idea alone. (adapted from Chapter VI, *Towards a Humane Society: Images of Potentiality* by Fox, Lippitt, Schindler-Rainman.)

Let's look in and join with the group of QUEST participants (about 60 in number) who gathered to make some plans for improving the teaching/learning experience in their respective schools.... or work settings. There were ten teams ranging in number from 2 or 3 up to 7 or 8, depending upon the size of their school. The principal or assistant principal was, without exception, a member of the team. Each team is seated at a table which they selected as their "turf." All the teams are asked to take a leap forward in time. This leap could be as short as six months or as far

forward as eighteen months. The instructions were something like this: "You are on a helicopter or magic carpet and have moved ahead in time to whatever period you selected. You are hovering above your school looking down at what is happening...you have perfect vision of all that is going on below you (you can see through walls, buildings, etc....). As you are viewing all the 'action' that is taking place...what do you see happening that makes you *pleased* with the progress that has taken place? Remember, you are there, now! Jot your observations in the present tense."

At each table, team members are now asked to call out, in the present tense, all the images they see that please them. Images from each group are written on large pieces of newsprint with felt-tipped pens. The sheets are then posted on the walls with masking tape so everyone can wander around and see the other groups' products.

Prioritizing: Now the groups are asked to have each individual star the two or three items they would most like to have happen; then the group selects from these 'starred' items the one image they wish to give priority to as a team, and to state that "image" as a goal. One team selected as their goal "At least 15 teachers will incorporate some method of individualized instruction...within 2 months." Each team member also selects a personal goal image to work toward as a personal project.

Force field Diagnosis: The next part of the process is built on Kurt Lewin's forcefield theory (See Chapter 12, Exhibit VII for more detailed information). Each team is asked to list all the supporting or 'driving' forces that they can think of, that they think will help them reach the team goal; and all the things they think might be 'blocks', or restraining forces that might hinder them from reaching their goal. These are listed in this manner:

GOAL: AT LEAST 15 TEACHERS INCORPORATING SOME METHOD OF INDIVIDUAL INSTRUCTION BY _____(date).

Helps: Driving Forces	Blocks: Restraining Forces
Felt need for new ideas and procedures	Resistance within the system to new ideas
Administrative support for in-service training	Classes are too large
	Not enough time for planning
Need to cope with larger number of students	Shortage of resources (funds, books and supplies)
Enthusiasm of QUEST team members	Teachers are unsure of specific ways to incorporate individualized instruction into classroom situations and experiences
(etc.)	(etc.)

Now the teams are asked to check and make sure they have listed *all* the driving and restraining forces they can think of. If there is time, groups can be asked to indicate their estimate of the strength of each of the forces in the force field, according to the "weight" or strength of the force as they see it. This can be done simply and quickly by numbering the forces on each side....assigning a number from 1–10 to each force to indicate its potency.

As groups use this diagnosis to plan action, they have the following planning choices:

—Take the strongest restraining force and brainstorm all the alternative action steps they could take to remove or diminish that force;
—Strengthen the strongest driving forces by brainstorming all the ways to do so;
—Combine strong driving forces;
—Reverse a strong restraint into a driving force. This is sometimes quite possible;
—Plan ways to remove some restraining forces;
—Create additional driving forces.

Usually the choice that will bring about the most payoff, and affect the greatest amount of change, is to remove or diminish some of the key blocks to achieving the goal.

The biggest block indicated by our school team is: "Teachers are unsure of specific ways to incorporate individualized instruction into classroom situations and experiences." So the group now brainstorms all the ways they can think of to individualize instruction in the classroom. This list includes:

1. Have teachers' aides work individually with children on projects
2. Identify the interests of individual students
3. Hold a workshop on individualizing instruction, with sharing of successful ideas from teachers
4. Increase the number of content offerings in each classroom
5. Share individual teachers' skills among several rooms
   (a total list of 16 ideas)

The idea selected for implementation by the team was #3: "Hold a workshop on individualizing instruction, with sharing of successful ideas from teachers."

Next, the team converts the idea(s) they have chosen into "action-steps", with appropriate time-sequencing, using an Action-Plan Worksheet similar to the model shown below. This step gives clarity and focus to the task by thinking through:

WHAT significant "others" do we need to involve to support or implement this idea?

WHAT action(s) or support do we need from them?

HOW shall we go about it?

WHO will do what?

WHEN will it be done?

ACTION-PLAN WORK SHEET:

OUR GOAL IS: TO HOLD A WORKSHOP ON INDIVIDUALIZING INSTRUCTION, FOR ALL TEACHERS IN OUR BUILDING, AND SHARE SUCCESSFUL IDEAS WITH EACH OTHER

OTHERS WE WANT TO INVOLVE IN WORKING ON THIS GOAL:

NAMES	What We Want Them To Do (assistance, advice, or resources we need from them)
Principal	O.K. released time for teachers' in-service
Curriculum Coordinator	Select innovative materials and resources for display and recommend a "specialist" for workshop resource person
In-Service Training Committee	Negotiate time and place of workshop, and "advertise" for good ideas to be shared around individualizing instruction

OUR FIRST ACTION STEPS	*WHO will do WHAT*	*HOW*	*WHEN*
Contact the principal for O.K.	Mr. LeGrand will talk to him	In person	Monday
In-Service Training committee will negotiate time and place	Members of committee	Immediately after OK from principal	
Announce this workshop to faculty and ask for particular areas of need and input.	Gary Sandrow will speak to individual teachers, and post an announcement	produce bulletin board announcement.	

Forms circulated for soliciting best ideas to be shared during the workshop	Colleen Gray will design a form to be circulated through school mail	mail 10 days before event
A design for the workshop is created based on hoped-for outcomes	Consultants working with teacher committee	meet with Committee 5 days before event

These action steps lead naturally into the task of designing the workshop. The task was delegated to a Task Force chosen by the workshop committee. The task force utilized the forms below to collect data and plan a meaningful flow of activities:

Meeting_____ Date _____

PRE-PLANNING DESIGN SHEET

CLIENT POPULATION Who are they? Groupings and ages, etc.	HOPED FOR OUTCOMES, LEARNINGS, BEHAVIORS ETC.	POSSIBLE ACTIVITIES LEARNING INGREDIENTS, ETC.	MATERIALS RESOURCES AND ENVIRONMENT Room set-up, equipment, etc.

ACTIVITY FLOW SHEET Meeting_____ Date _____

TIME	ACTIVITY	Who is Responsible	Materials and Equipment

Designing as a Part of Planning

Planning for a meaningful and helpful experience which provides appropriate learnings and also "fits" into the continuity of the long term goals and objectives of the QUEST project calls for mobilizing and using all the available resources which will facilitate learning and problem-solving. This is the focus of the design task. Two levels of designing must be considered: "Macro" and "Micro" designing. These terms can easily be confusing rather than helpful if used or applied out of context. Simply stated, Macro means large-scale and Micro means small-scale.

Macro-design refers to the overall outline for a particular training, consulting or change activity. These are the decisions about the overall goals and sequence of the learning activities; including questions like: what kinds of groupings are most appropriate for the participants in terms of the overall objectives of the total learning activity? What kinds of activities can be carried out most effectively during various phases of the learning experience and which ones are most appropriate for different times of the day when energy levels vary? In terms of practice, Macro-designing is an important consideration. A good Maco-design provides a structure for the Micro-designs that will be carried out within the total project. This level of decision-making might be thought of as the level of "curriculum" decisions, as contrasted to "lesson plans".

Micro-designs are, in fact, the very specific elements of larger Macro-designs; they are the small "parts", which need to be very carefully planned and thought out...what Micro-designing is all about is providing the *means* to the *overall* goals of the Macro-design.

The Pre-Planning Design Sheet above is more relevant to the Macro-design level since the information and data refer to a broader framework than a single Micro-experience; while the Activity Flow Sheet deals with specific Micro-design elements and activities such as start-up activities, skill development exercises, feedback modules, process-interventions, evaluation tools, etc. (For additional data on designing learning experiences, see reading #10, Chapter XI.)

Skill Practice Models Used by QUEST Participants

Skill practice....and repractice, is an important aspect of most participatory learning experiences. The following models of skill practice designs were used by QUEST participants.

Anticipatory Skill Practice is a way of gaining experience and skill in dealing more successfully with events, interactions, or situations which you anticipate being a part of your future life or work-space. It is an opportunity to "experience" the event or interaction without the usual element of risk which is present during the real thing....thus you have the opportunity for practice without the risk of "playing for keeps".

The rationale for including large amounts of skill practice in the

QUEST training experiences is that most of us tend to have a limited repertoire of behavioral responses to call upon in a given situation, especially those situations which involve confrontation or other kinds of stress. Reflecting back upon such situations, most of us have probably remarked or thought, "I wish I had the chance to relive that experience....I really would do some things differently!" Anticipatory skill practice gives you the opportunity to practice and re-practice dealing with situations *beforehand* (so you can use and benefit from the skills and learnings acquired), rather than *afterwards* when you can only look back upon the experience and wish you had done things differently.

The frequent opportunities for "behavioral" skill practice which QUEST participants received enhanced their interpersonal communication and problem-solving skills to a marked degree. After the first two months of the project, skill practice became an expected and "fun" part of their ongoing designs for team meetings, faculty meetings, classroom interactions, and training experiences.

A helpful model for Anticipatory Role Play Skill Practice is given below....it can be used with groups of any size, from 3 persons to 300.

TRIO ROLE PLAY SKILL PRACTICE (HRDA MODEL)

I. YOU ARE THE PERSON WITH THE SITUATION THAT IS TO BE PRACTICED.

Select someone to play the role of the person or persons you are interacting with in the "back-home" situation. You may take your own role...or you may take the role of the person you wish to interact with (in order to get a "feel" for how they may view or react to the situation)....whichever is more helpful.

Brief the other person(s) on their role, and what the situation is.

Set up the situation (e.g.: "I am entering the Principal's office to ask for released time for an inservice training day for our team....."

II. YOU ARE THE "SECOND PERSON" IN THE ROLE PLAY

Your task is to get into the briefing which the first person gives you, as completely as possible. Listen carefully to the briefing, and then follow it as well as you can throughout the action... using your own feelings in reacting....until the "Observer" cuts the role play.

III. YOU ARE THE OBSERVER(S)/CONSULTANT(S). YOUR FUNCTIONS ARE TO:

a. Observe the interaction....particularly what is helpful about the interaction, and what is unhelpful about the interaction.

b. "Cut" the action in 3–4 minutes (NO LONGER!) or when enough interaction has taken place for them to discuss it...DO NOT let it go too long.
c. Ask each participant: "How were you feeling in your role just now" *and* "What were you thinking...in your role just now?"
d. Have a short discussion period reflecting thoughts/feelings of the participants PLUS your own observations (very briefly).
e. Brainstorm (all together) the alternative behaviors that could be tried out to produce the effect or results you want. (each participant keep his own notes of the brainstorm)
f. Start the "Repractice" with the same persons in their roles... trying alternative behaviors,....or reversing roles if this seems helpful.
g. "Cut" again, and discuss...trying out another alternative if time permits. Someone else might model another way it could be done, if time permits.
h. Before going on to someone else's situation, summarize the learning(s):
    i. Skill points to focus on
    ii. Traps to avoid in the situation

Critical Episode Skill Practice provides another type of opportunity for individuals to gain confidence and skill in dealing with back-home on-the-job situations or interactions which they anticipate difficulty dealing with as successfully as they might like to. Typically, this has to do with some interaction with another person; a colleague, student, administrator, parent, or community person.

This type of skill practice proved to be especially valuable because: 1) individuals were able to identify specific kinds of situations they felt they needed help with, 2) they gained additional insight(s) as they set up the role-play situation, 3) they received the benefit of several other persons' thinking during the brainstorm of all the alternative ways the group could think of to deal with that situation...thus greatly expanding their repertoire of possible responses to the projected confrontation, 4) each person had the opportunity to "play through" the situation and get a "feel" for the various alternatives, without the risk of being in the real situation, 5) they received observations and feedback from other group members about how others viewed their reactions and style of coping....as well as feedback from the other role-player who was in the "protagonist" position, 6) there was also the opportunity to re-practice the situation, choosing several alternative styles of response to experience how they felt and become more comfortable with the concept of "choosing" how to respond, rather than being locked into a particular mode or style. The following model was used very successfully to provide Critical Episode Skill Practice for QUEST participants.

CRITICAL EPISODE SKILL PRACTICE DESIGN

1. Each person visualizes and writes down an interaction (confronta-

tion, problem situation, etc.) they think they might have difficulty dealing with. Example: a confrontive, angry parent demanding special treatment for her child who had violated the discipline code.

2. Gather in groups of 3 or 4. Share your episodes briefly (about 1 minute each) and select one to work on.
3. Create a role play situation around that episode leading up to a confrontation statement or "punch line" that makes you ask: "What do I do now?"
4. Two groups of 4 get together and one group plays out their situation for the other group, stopping' with the "punch line":
5. Both groups (of 4) then brainstorm all the ideas or ways they they can think of for dealing with that confrontation.
6. Groups reverse the process—group 2 role plays for group I—both groups then brainstorm for group 2 ...giving them all the ideas they can think of.
7. Groups go apart and try several of the suggested alternative solutions, assessing them for how you feel about them and what the effects are.
8. Start over with another person's episode and repeat the entire process. This time you have the choice of joining with another group or doing the skill practicing within your own group, and re-practice.

The Self-Running "Sealed Envelope" Skill Practice Technique. This model of skill practice provides for variety and liveliness in coping with a variety of situations. Several envelopes describing various situations are available to small groupings (trios) of participants. The envelopes are identified on the outside by titles which give a brief description of the focus of the exercise, e.g., "Teacher-Student Confrontive Interaction," "Dealing with 'Killer-Statements' in Faculty Meetings," "The Passive Person Problem," or "The Angry Parent Strikes Again."

Each envelope contains four briefing slips, describing the part each individual is to play: e.g.,

(1) "You are an angry parent who feels her child has been singled out to be picked on *again* ....this is it, you have *had* it! You are going to really "get" that teacher!"
(2) There is also a briefing for the target person, in this case the teacher, who is providing the stimulus for practice.
(3) A briefing for the Observer-Consultant, the person who sets up the role play (describing the situation and setting), and "cuts" the action at the proper time.

These briefings are private....no one knows what the other person's role is until they identify themselves, e.g.: "I am the teacher who disciplined Jane today." "I am the Stage Manager and this is the situation....I will stop the action at the proper moment." When the role play has been completed and de-briefed for feelings and learnings, the briefings are returned to the envelope which is then taken back to the resource table and another envelope "situation" is chosen.

The Observer-Consultant's briefing slip is as follows:

a. You are the observer-consultant to your trio fellow group members.
b. You read the attached situation to them.
c. You ask the group members to read their briefings to themselves and get ready to play their respective roles.
d. You set up the physical situation—chairs, etc.
e. You get them started.
f. You cut the role play when it looks and sounds like they've said it all once (no more than 3–5 minutes) so there is time to repractice.
g. Have a short discussion period
   1) asking how each felt
   2) giving observations you have
   3) have a brief brainstorm session to alternative behavior possibilities.
h. Start re-practice with same person in each role.
i. Cut and discuss again.
j. Decide if someone different wants to try or: the same person retry or pick another situation.
k. Summarize learnings; skill points and traps after you have exhausted gains from practicing one situation before going to another one.

Summary

In this chapter we have stressed the importance of providing opportunity and support for skill development in the areas of communication, group leadership, and planning. The truth of our statement that, "A good intention is only as strong as the skill to carry it through," has been proven again and again as we have seen some teams and individuals make remarkable progress in dealing with difficult situations...because of their commitment of time and energy to acquire the skills needed to cope with the problem areas they faced. These persons responded enthusiastically to the opportunity of viewing discouraging situations in new ways. "Through new eyes..." was the way one participant expressed it. On the other hand there were a few who adopted a "show me... prove it to me" attitude, and either did little or dropped out along the way.

The HRDA training staff and the QUEST participants shared many, many delightful moments together exploring possibilities and "celebrating" breakthroughs....even small experiences of success which came as a result of collaborative assessment and diagnostic work, exploring alternative possibilities, projecting "images" of what we would like to see happen, and ways of making these things happen, setting team goals and personal goals from these images, setting action steps and organizing them, developing support within ourselves and among our colleagues for making them happen, evaluating the effectiveness of our efforts and re-

designing with feedback to stay on the right track...with continually assessing of the skills needed at that particular time... proved to be a formula that worked for us!

As a result of the continual administrative involvement and support for training sessions, coupled with the enthusiasm of dedicated persons who saw the QUEST project as a "light at the end of the tunnel"...an opportunity to achieve change within a massively large system. We observed increasing *congruity between the thinking, feeling and doing* ....of individuals who developed the willingness and confidence to trust their growing repertoire of skills, their intuitive feelings and their competence as professionals to move ahead and make decisions that would enhance the quality of education and enrich the experiences of students in their schools.

Chapter VIII.

Documentation and Assessment of Progress

Introduction

Any planned change effort that involves individuals and the organization in the energies and confrontations necessary to examine current goals and practices, and to work on improvement, must be concerned about steering, accountability, and dissemination.

The steering idea refers to the fact that the guiding of any process of change is a series of planning-trying-reviewing-replanning efforts. Feedback must be sought on each step of effort in order to minimize wasted effort and dead ends. And review of progress (or lack of it) is needed to provide the basis of motivation to continue committing time and energy to the effort.

The accountability idea refers to responsibility to report the degree of success in achieving deserved outcomes to those who funded, sanctioned, or supported the effort, or those who have some other vested interest in the worthwhileness of the effort, such as the parents of the children who are being taught.

The dissemination idea refers to the responsibility of all social inventors (e.g., those who try to develop and try out a new educational practice) to describe their discovery and its use in such a way that others can profit by their learnings, e.g., can adapt or adopt what worked or avoid the mistakes that were discovered.

Although, as is so often the case, the budget for documentation and evaluation was very modest, the QUEST team tried to include all three of these functions in their effort. The core of the effort was the role of documenter-data-collector in each building team, and the frequent meetings of the steering group to review the feedback and re-plan the directions of work. Some of the types of qualitative data which guided the steering group, and provided the basis for celebration-motivation of the participants, has been summarized in Chapters 1 and 2. The documentation of the project is represented by this total volume. In this chapter we are summarizing some of the efforts to evaluate progress with regard to desired outcomes. It is important to remember that specific desired outcomes were different for each team and individual participant. The desired outcomes of the inside-outside team had to do with activation of effort toward change-effort, the development of mechanisms for continuity of effort, the development of peer collaboration about goal setting, and problem-solving, etc.

The Documenter Function and Role

The documenter function and role was a unique aspect of the QUEST program. The documenters served two functions; 1) as a source of ongoing evaluation and feedback which included securing some information describing the flow of successes and failures regarding the efforts of each change team; 2) as a local representative and contact person to solicit cooperation of teachers in collection of assessment data.

There was a documenter on each team who volunteered for the responsibility and who received additional training. The extra time spent with these representatives of each team was used to focus on: 1) rationale for why evaluate; 2) some of the scientific knowledge upon which QUEST was based; 3) some of the assumptions which needed to be tested; 4) acquainting the documenters with the data collection forms and procedures to be utilized during the life of the project. It turned out that part of the motivation for volunteering to be a documenter was to gain some additional knowledge about the project or to gain some additional research and evaluation skills.

Evaluation Findings:

The evaluation data consist of two kinds of information. We collected qualitative data, which gives us the reactions of participants in their own words. This is hard to quantify with standardized categories. We also collected quantitative data, which was relatively easy to tabulate although somewhat less informative about individual and team achievement of their particular objectives.

Indicators of success and failure:

We collected some information at each of the workshops. Periodically we would stop and assess where each team was with its action plans. It was helpful to stop and list things which indicated we were being successful as well as unsuccessful. The list of "indicators of success" represents what people perceive had been already accomplished. The "indicators of failure" represent outcomes which people planned for but felt they had not yet achieved. In a project of this complexity it is very easy to lose sight of the successes, which occur daily, and focus more on the problems, failures and unattained goals. We know it is important to keep our focus balanced and stay aware of successes as well as failures. Too often we have seen individuals and groups lose the will to go on, because they have lost touch with reality and become immobilized by only focusing on problems and failures. Thus we obtained two sets of data, "indicators of success" and "indicators of failure." These lists were generated by the QUEST team participants (teachers, administrators, and special service staff). The project had been going a year. It was 3 months before project termination when the lists summarized below were compiled. All the

teams but one were very active and beginning to look towards the next year.

Indicators of success in our school (The categories were developed after the lists were made)

1. Increased Trust Between People

—Other people wanting to be part of the QUEST project
—The large number of volunteers to continue in training
—Establishment of the norm that we want everyone's idea
—We are sharing much more
—We have gotten to know team and other staff members much better
—Willingness of older staff to accept new staff in leadership positions
—Knowing that administrators won't pull power plays

2. Program Level Benefits

—QUEST skills are used in planning meetings and workshops
—The pupil Personnel Staff are feeling more a part of the building staffs
—Adoption of innovative programs
—Teaming up with other QUEST teachers and projects
—Using QUEST skills with community groups
—Reaching further into the community to involve others

3. Improved Problem Solving and Planning Skills

—Being able to plan more "turned-on" meetings
—Teachers involved in brainstorming about how to improve own teaching styles and classroom environments
—Regular weekly team meetings
—Utilization of in-house resources
—Decisions are now being made with the goals in mind!
—We have really reassessed our goals
—There is a greater sensitivity to the needs of the total staff
—Staying on target with our time lines and plans
—Recognition of the value of brainstorming
—Increased out-put with no added monetary expense

4. Improved Communication

—Our feeling of enthusiasm for getting together again
—Getting feedback from colleagues that we feel like a team this year
—Improved communication
—The faculty more able to express themselves in meetings
—People more sensitive and conscientious
—Feedback from colleagues on successful team events

5. Direct Classroom Benefits

—Using QUEST skills to improve student relationships
—Using QUEST skills to improve teaching techniques

—Discussion among students that good things are happening in school
—Children's independence being expressed more
—Have learned to understand children better

6. Improved General Attitude About the System

—A feeling of enthusiasm and confidence that things can be changed
—Taking off from school less often—students and teachers
—Willingness to accept programs initiated by central administration
—Not being completely frustrated by barriers
—Willingness to expend energies to make changes

The types of things people saw, simultaneously, as indicators of failure (or of unfulfilled aspirations to date) were as follows:

Indicators of Failure in our school: (categories applied after the list was compiled)

1. Lack of Trust

—Still some negative reactions from staff
—Suspicion by some that QUEST is an accountability technique
—Some still feel like big brother is watching
—Some staff still question QUEST

2. Difficulty in practicing new behaviors and skills

—One team has opted out
—Sometimes members slip back into their "old evil ways"
—We are so involved in projects that we can't meet as a team
—QUEST team members need more skills
—No action comes from talks
—Negative reactions still from some kids
—We are unable to reach 100% of the children
—We are unable to reach 100% of the staff and administrators
—Not enough QUEST functions
—Lack of cohesiveness among team
—Need more moral support
—Team members forget to practice active listening among selves

3. Continued lack of communication

—Some people really don't understand it (QUEST)
—We need to hear more successes from others and share whatever they are doing
—Some people expect too much from QUEST
—Lack of understanding among staff
—Some workshops not so helpful as we want

4. Continued negative attitude about the system

—Some people don't expect enough from QUEST

—Continued feels that we can't do it
—People are still complaining instead of doing what they can
—We have undertaken a mighty big job

5. Resistance to change

—Indignation
—Obstacles in trying to involve other staff
—We get blocked by some staff members
—Some staff members are still apathetic

6. Blockages in the larger system

—Pressure from central board sometimes threatens morale of the faculty
—Strike caused negative reactions
—We need substitutes to allow meetings and activities
—New barriers arise
—Our building is in chaos and QUEST isn't solving it.

One very clear observation is that the successes indicated numerous and widely varying changes and improvements. On the other hand the second list suggests that after a year of work there were still setbacks and blocks to be overcome. It is safe to conclude that lots of exciting things were happening and a lot of creative energy was being expressed in schools and central offices which would not have been taking place if the QUEST project had never happened. But expectations had also been raised which stimulated impatience and frustrations, requiring more support and help in "working through".

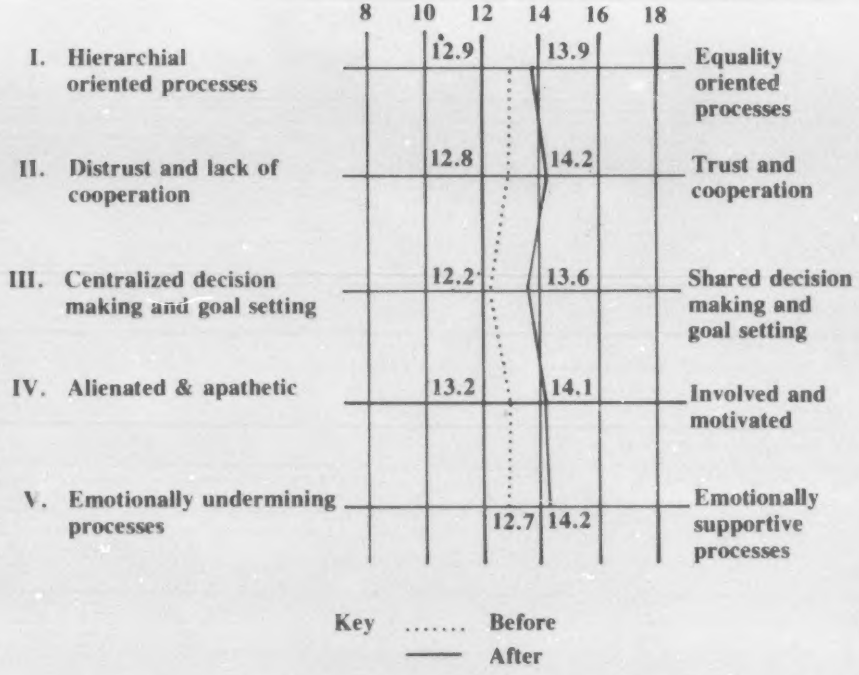
Organizational Climate Profile Analysis

The qualitative information which we collected reflects our interest in individual reports of learnings and criticisms as a major technique for staying sensitive to the growth and needs of participating teams and individuals. This enabled us to make better decisions in our re-planning and training designs. In addition, we collected some quantitative information which would reflect, in a subjective way, what was happening on organizational levels within the schools. This information was collected at the beginning and at the end of the project. We made use of the "Profile of a School" (See Chapter 12) which diagnoses the organizational climate of a school. Five different areas of organizational functioning are measured: 1) The amount relationships within the organization are based on hierarchial versus equality oriented criteria, 2) The extent to which people feel trust and cooperation are taking place versus distrust or distance and lack of cooperation, 3) The amount of shared participation in decision making and two-way communication versus decisions being made centrally and communications mainly from top to bottom, 4) The extent to which people are feeling involved and motivated to do a good job versus feeling

alienated and apathetic; 5) The extent to which people feel the school is a supportive and desirable place to work versus an undermining and undesirable place to work.

Presenting all these data within the scope of this document would be inappropriate and the results would be too lengthy. We shall present 3 case examples which are representative of different experiences within the QUEST project. It is our hope that this will be helpful in further developing an understanding of what happened in QUEST.

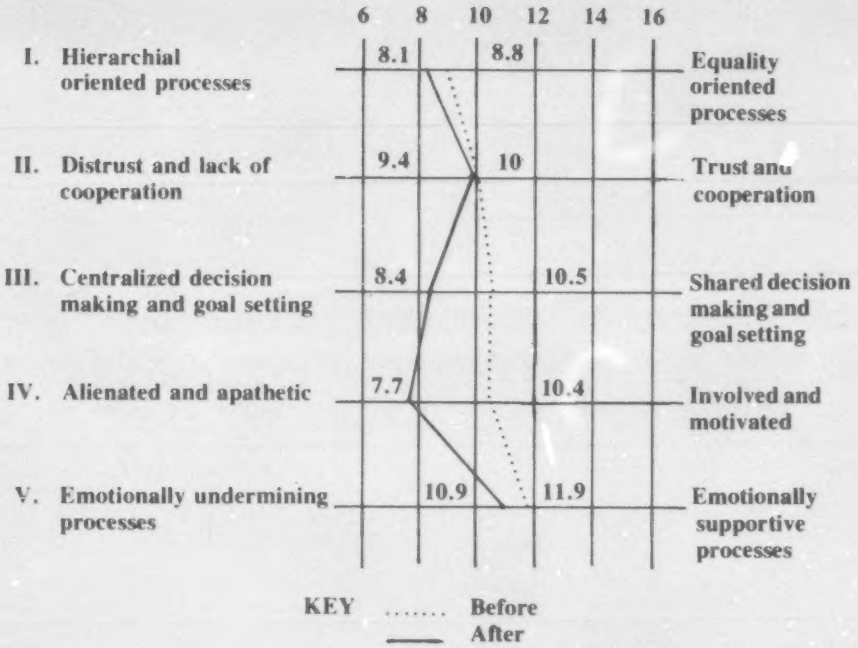
SCHOOL A



This graph represents teacher and administrator perceptions of their school. Some were members of the QUEST team and some were chosen at random from the rest of the faculty. The first measurement was taken just after the project began. The second measurement was taken as the project ended a year and a half later. Each point represents the average score for all individual responses which relate to that category.

School A is an elementary school with 1500 children and 45 teachers. The graph indicates that teachers perceived changes in the organizational climate of their school in the direction of becoming more open and participative in nature. They perceived the principal as becoming more friendly and supportive. They thought that downward communications were viewed less with suspicion and more often accepted. Teachers also perceived a change from feeling some resistance to achieving high educational performance goals to feeling little or no resistance. Furthermore they perceived more freedom to make specific decisions at lower levels without having to check back first, while the broad policies were still made at the top. There is a feeling that the principal is now well aware of problems which teachers face and that this is a change. Teachers also report a feeling that they participate with more meaning in establishing the goals of the school. There is a perception that teachers are being supportive and friendly to each other more frequently and certainly more often than before.

SCHOOL B

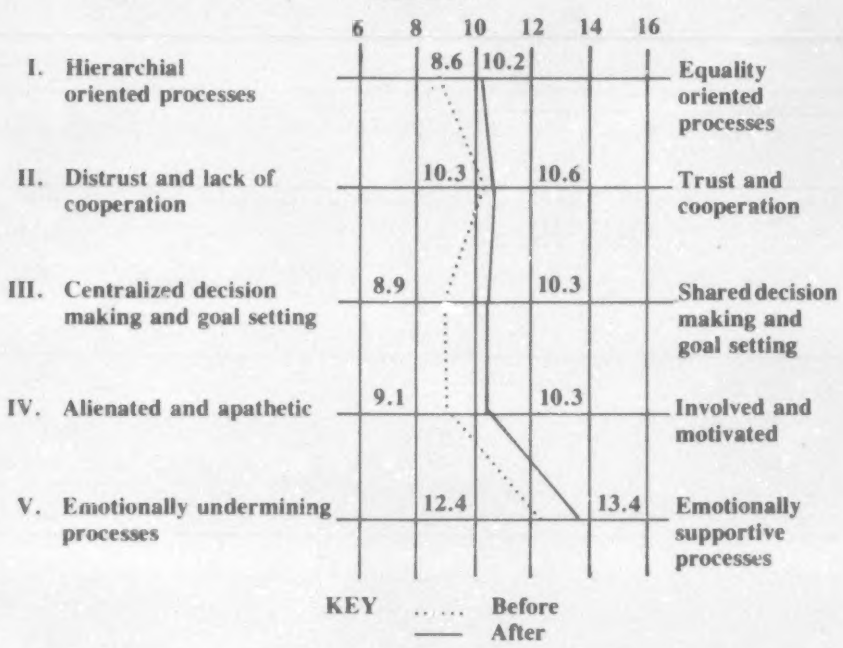


This graph represents teacher and administrator perceptions of their school. Some were members of the QUEST team and some were chosen

at random from the rest of the faculty. The first measurement was taken just after the project began. The second measurement was taken as the project ended a year and a half later. Each point represents the average score for all individual responses which relate to that category.

School B is a junior high school which was coming apart at the seams. It was town with racial strife and vandalism was high. The student enrollment was 2,300 with a faculty of 65. In some instances the changes were not that pronounced, but it is easy to see that things became less open and participative. The QUEST involvement may have helped teachers cope, but did not lead to solutions for the tragic and explosive conditions within the school.

Teachers did see the principal as more friendly and an easier person to talk to, but they seemed less satisfied with the quality of supervision and perceived the school with a less positive attitude as a place to work. The teachers perceived that the moderate amount of trust and positive interaction which previously existed had been reduced to less trust and more distance between teachers with a less positive attitude towards each other. The communication patterns became more one-way (top to bottom) and teachers became less involved in decision making. There grew to be less team work and more fear of threats to keep performing highly. In addition teachers perceived themselves as less supportive of the principal.



This graph represents teacher and administrator perceptions of their

school. Some were members of the QUEST team and some were chosen at random from the rest of the faculty. The first measurement was taken just after the project began. The second measurement was taken as the project ended a year and a half later. Each point represents the average score for all individual responses which relate to that category.

School C is a combined junior high and elementary with two separate programs and staffs in one physical plant. The elementary staff numbered 30 with a student enrollment of 1000 and the junior high faculty numbered 40 with an enrollment of 1200. Having the two schools in one facility intensified the typical problems of organization and management. There was one principal.

Changes occurred, as perceived by teachers. The organizational climate became more open and participative. The principal was seen as having become much more friendly and teachers perceived that they had more confidence and trust in him, and felt more free to talk to him. On the other hand, teachers showed little gain in openness, trusting and cooperation with each other, though they felt more shared responsibility for keeping the educational standards high.

Teachers perceived that there was more two-way communication on academic and non-academic matters and more shared participation in goal setting and decision making. Teachers also reported feeling more listened to and feeling more supportive of the principal.

Only one team and school showed the "loss" pattern and the conditions at the start were so negative that clearly some basic "organizational therapy" would have been required. All schools went through a great deal of external stress to staff relations, including a prolonged strike. The fact of such positive organization profile outcomes seems to us a remarkable testimony to the impact, in a relatively short time, of the team efforts.

Final Evaluation Interviews

After the project had been officially terminated an evaluation interview was held with stratified samples of nearly ⅔ of the participants. The responses to several important questions are summarized below:

Question 1. Considering the total QUEST project, what do you think was the most helpful or worthwhile part of it? (A learning activity, a resource that was provided, etc.)

Most frequently people mentioned that the chance to really get to know other people (from other schools, from other races, from their own school) was most important. Others mentioned knowing that other people had the same problems and concerns was most important. Many people mentioned the resources they learned about were important. The residential training event away from the schools was frequently referred too as the most helpful activity. In addition, skills such as brainstorming and the chance to plan in depth were mentioned. People also mentioned learning

more about self or others and growing to feel more confident as a person or with groups.

Question 2. What was an important or major personal learning or awareness which has accrued from working and participating in this project?

The chance to understand others' feelings and thoughts and to incorporate their ideas with one's own ideas was mentioned more frequently. The increased ability to work with and get participation in large and small groups effectively, and a clearer sense of program management was frequently stated. Many people mentioned a chance to become self critical and increase their acceptance of self and others. Particular group skills were also mentioned.

Question 3. What do you see as your team's greatest success?

The answers to this question fell into two categories. The largest group of responses referred to the rest of the faculty. Many teams reported improved rapport between faculty and between faculty and administration, and reported increased participation and involvement in meetings and programs. There also seemed to be an increased sharing of concerns and requests for help and more productive participation in programs and activities. Many teams also reported improved communication and increased understanding and communication at faculty meetings and at other such gatherings. Several teams reported the acceptance and use of group problem solving skills at meetings and by others on the faculty, which means the teams were successful in teaching these skills to their colleagues.

The other category referred to students and classrooms. A few teams listed their major success as increasing teacher awareness that students were real people with individual thoughts and feelings. Others reported more student oriented teacher responses to classroom discipline and control and attempting new and improved teaching behaviors in their classrooms.

Question 5. What are any mechanisms or structures that are in motion or adopted out of QUEST efforts?

The most frequent answers indicated the continued use of such problem solving skills as brainstorming, force field analysis, the use of small groups, role playing and active listening. Then there were a lot of specific activities such as a suggestion box, a regular newsletter, meetings are organized, meetings are planned ahead of time with goals and agendas. A third category of responses referred to program level activities, such as: regular luncheons, special workshops, staff and community events, new programs in reading and so on. Then there were some attitude changes mentioned; for example, new outlook by the teachers for new approaches to teaching, constant evaluation, more talk about leadership styles. Only

one person mentioned that nothing significant was going on at this time as a result of QUEST.

Question 6: Do you see any differences for kids as a result of the QUEST training, planning and practices?

Many people said yes. Some see that the participatory practices and involvement in planning techniques have filtered down to the classroom. Some see students being involved more in making more choices, more teacher-pupil planning, and more voluntary evaluation. Some saw higher student participation. Only a few saw no impact on students. Their comments usually were that the QUEST practices were not fully integrated or hadn't really reached the classroom level of the building yet in one year.

SUMMARY

We had a final training and evaluation event with all the QUEST participants to: 1) terminate the relationship with the inside-outside consulting team, 2) evaluate the project activities, 3) help teams identify where they were and decide on their goals, aspirations and plans for the next year. This meeting occurred a year and a half after the project began and at the end of a school year. One of the activities was to summarize 1) learnings/discoveries, 2) decisions, and 3) how things are different for students. This list provides the best summary for this chapter. It is the best consensus of the participants about what did happen as a result of the QUEST project.

1. *Learnings/Discoveries/Excitements:*
   Self growth has occurred
   It is stimulating to learn what others have done
   It feels good to be realistic, but not discouraged...obstacles can be overcome
   There has been greater staff participation and support in making school policies
   It is of utmost importance to spend time together regularly and to do team building
   We have learned steps in problem identification and problem solving skills and have learned to recognize what we can and can't do

2. *Decisions:*
   Small work groups are more effective
   Everyone needs to be involved
   QUEST is becoming a stepping stone into other systemwide programs

3. *Differences for kids:*
   Children are more involved in decision making
   Teachers are actively listening to students

Acceptance of others and their differences by students as well as teachers
Many students are more positive
Kids are more like winners than losers

A major question which remains is, so what in the long run? This is unanswerable in any definitive way. We do know that it made a difference for teachers and students during the project.

That is one significant outcome. Several of the inside-outside consultants have had occasion to be in continuing contact with several of the participants of the QUEST project. The tenor of these contacts is usually animated and full of what new and exciting things are happening now, as well as some of the failures. This is very different from similar conversations two years ago which focused more on how awful and hopeless things were. QUEST was a major stimulus and quality model for a systemwide program of "upgrading quality of teaching" which was launched as QUEST was terminating. It is clear that a central office team has learned and are utilizing many of the skills and procedures learned from the QUEST Coordinator, who was a temporary member of their team as model, trainer, and colleague-peer.

Chapter IX.

Beliefs, Sensitivities, Competencies, Commitments, and Resource Development

Throughout this report of our QUEST adventure we have emphasized that the right values, intentions, policy decisions, and funding resources are not enough. In our guiding assumptions, our design for action, our skill development practice sessions, and our procedures for followup support and maintenance we have emphasized the necessary disciplines of teamwork and of linking good goals and intentions to skills, action and feedback mechanisms.

We'd like to summarize, at this point, our observations about the core ingredients of successful effort in this type of educational change process. Then we will share our conclusions about what is required to acquire and maintain these resources basic to success.

Orientations and Competencies of Top Administration

We believe the role of the top administrator in this project represents an excellent model of many of the basic requirements for the successful initiation and implementation of an effective organizational change process. We have divided our observations into those characteristics which seem primarily related to a successful initiation of effort, and those characteristics which are critical for the successful carrying through of the change effort.

Belief and Skills Which Help Initiate a Good Startup of Change

1. First of all, the administrator had a basic concern and commitment about providing a high quality education for all children, and he had a belief that what was currently being offered under his leadership was improvable, and that he had the potentiality of influencing such an improvement.

2. Second, the administrator had enough security about his own self image and his status in the system to feel able and ready to risk innovative change efforts, and the possible ripple of consequences upward and downward in the system.

3. The administrator also had a belief that a significant majority of his staff in his various buildings and classrooms were motivated to do a good professional job of education, and ready to get out of their ruts of "ongoingness maintained" if they were provided with opportunities for voluntary involvement in improvement efforts which they perceived had the sanction and support of the power figures in their system.

4. This belief in the potential of voluntary motivation was very crucial. This included the belief that volunteerism of motivation and commitment was the basic source for energy release. He believed that high standards of professionalism could be teamed with the energy and internal commitment of volunteerism.

5. The administrator recognized that the modeling of a personal commitment to a change effort by himself was one of the keys to the launching of a successful change effort.

6. The administrator recognized that there are significant resources and models for successful change in existence and one of his key responsibilities was to find a successful linkage between those resources and himself and his staff.

7. The administrator demonstrated an ability to scan his situation and to assess and involve good quality outside resources which he believed would have the experience and competence to attract and involve his staff and to provide them with the needed resources of concepts, skills, methods and release of energy.

8. The ability and initiative to interpret the projected change effort to sanctioners and funders was a critical attribute.

9. Rather than importing some outsiders to "do a job", the administrator had the confidence and competence to enter into a colleagial peer relationship with the outside resource persons.

Competencies of the Administrator Basic to Successful Follow Through Implementation

1. The administrator also organized his own time schedule to give priority to time for participation in the activities of the change effort, including all training events.

2. He communicated to his administrators and teachers his sanction for giving priority to project time requirements for the personnel involved.

3. He gave support for shifts of personnel role assignments and funds to permit and support the needed time for planning and training activities.

4. He teamed up on a peer basis with the outside team members, meeting sometimes in his shop and sometimes in theirs, and demonstrating openness rather than defensiveness as various confrontations with established routines, policies and practices were encountered.

5. The administrator worked actively on developing and practicing the skills of team leadership of his own administrative team. He clearly applied his learnings in designing and conducting effective problem solving activities and staff meetings.

6. He sanctioned and supported role shifts in the activities of his own central administrative and supervisory staff so that they could develop their skills as an internal consultant and training team. He supported their securing outside advance training as trainers and consultants.

7. In spite of the pressures of high involvement in the "here and now" of the innovations in educational practice, he continued to give priority to the documentation, evaluation and dissemination activities which were important for the future continuity and spread of the current activities.

8. He provided the "linker" from the outside resource team with office space in his own suite, provided access to all service personnel, and provided personal linkage of the resource coordinator to all parts of the system.

9. He modeled, by his personal initiative, the use of the project coordinator as a consultant in his own personal-professional planning and decision making, clearly demonstrating that the use of such a resource was an evidence of strength rather than weakness.

The Success-Supporting Characteristics of the Internal Administrative Supervisory Team

In the original design for action it was hoped that some of the key members of the central office administrative and support staff might become involved as members of an internal support and maintenance team that would help guarantee the continuity of the implementation and maintenance of the changes which were achieved. What happened went beyond our original hopes and expectations.

Attitudes and Competencies that Helped with Startup

1. Administrative and supervisory support staff clearly expressed a commitment to direct service to teachers and students as contrasted to a primary commitment to the paperwork of an organizational bureaucracy.

2. They expressed a voluntary loyalty and acceptance of their administrative leader's priorities by volunteering to form a separate "change team" to work on improvements in their own functioning as a "headquarters group".

3. They recognized the potentiality and desirability of improving their own professional competence as consultants and trainers and participated in additional outside advance training provided by the resource group as part of their ongoing professional development program for trainers in the area.

They demonstrated a readiness to shift their own time schedule priorities to participate in new role activities as supporters of the project activities in the region and in each of the school buildings.

Competencies in Contributing to the Follow Through Implementation

1. They demonstrated a readiness and ability to team up across their departmentalized specialty lines to help plan and support the educational innovation efforts in the buildings.

2. They participated fully in the training activities of the program while working on their own skill development alongside the teachers and administrators from the participating buildings.

3. They demonstrated readiness and ability to take risks in trying out new methods and behavioral skills in their leadership and consulting roles, and to seek feedback about their efforts.

4. They continued to take initiative to utilize the project coordinator as a personal and professional consultant as they worked through new directions of efforts in their new roles as administrtors and supervisors.

The Supportive Orientations and Behaviors of the Principals

In an educational system the principal is really the key gatekeeper of innovation and adoption of new practices and materials in his or her building. Because of the orientation of the superintendent, the principal in this project played an even more crucial role in the startup as well as the implementation of any change effort.

Facilitating the Startup

1. A necessary ingredient was the principal's acceptance of the need for improvement of the educational process in the classrooms of his building, the potentiality for such improvement, and the readiness to put time and energy into exploring with his staff the readiness for change efforts.
2. The principal demonstrated a readiness to explore concretely "what it might be like if we got involved". This is already quite a risk-taking exposure and exploration of commitment.
3. Perhaps an even greater risk was the step of selling enthusiasm to staff members, and expressing a readiness to team up with several of them to participate in all of the training activities and risks of time and energy.

The Principal's Role in Successful Implementations

1. The principals took the risk to participate as leaders in all of the team training activities, and, in many cases, to support another member of the team being chosen as the team leader.
2. in addition, the principals worked on their own skills of leadership of faculty meetings and other similar role responsibilities.
3. The principals supported the time of the team members for meetings within the school program, and for faculty involvement time in new activities.
4. The principals sanctioned and supported the innovations of team members, and the spread of these ideas to other members of the faculty.
5. A part of their role responsibility as principals to be ready and able to interpret to parents and others the purposes and activities of the project.

The Orientation and Competencies of the Participating Teachers

The real linkage for any genuine improvement in the quality of the educational experience of children is the classroom teachers and their

changes in values, skills and resourcefulness to provide a richer educational opportunity and environment for the children. Although it is crucial that there be interest and support from the various levels above which have been described, all this support could happen without any basic improvement in the educational experience of students unless the teachers voluntarily became involved in an improvement effort. In the QUEST project we have identified the following types of orientation and skills as critical ingredients for facilitating successful change in the quality of education.

The Teachers Contributions to Getting Started

1. Participating teachers had to be ready to respond to the invitation from their principal or the nomination from their colleagues to make use of the opportunity presented by the project—a readiness to risk time and effort and some possible confrontations of their current way of doing things in their classrooms.
2. Also participation meant becoming a learner again, demonstrating a readiness to "be a student" in the project workshops.
3. Perhaps for the teachers, more than anyone else, becoming active in the project meant combining the modest reimbursement for professional development work with the significant amount of volunteer time and energy to introduce changes in the classroom or in the life of their building.
4. The willingness to risk exposing self in trying new things was an important aspect of every teacher's contribution.
5. Then there was the risk of sharing ideals and goals with colleagues and the risk of moving into commitments to try to do something about these ideals.
6. And in this project, as in other educational change projects, the participants had to cope with recognizing and accepting some of the inadequacies of current practice as a part of becoming involved and committed to trying to make some changes.

Requirements for Making the Change Effort a Success

1. Perhaps one of the most difficult things for the participating teachers in continuing their role in the building leadership team was finding meeting time to carry on their planning and strategy thinking as a team and to carry out their individual commitments to their teammates.
2. Another rather unfamiliar skill for most teachers was to function as a collaborative problem-solving peer group with fellow teachers and also with their principal included.
3. Another unfamiliar responsibility and skill was that of risking interpreting to and "selling" colleagues on becoming involved in project activities.
4. Risking asking for help and getting feedback from peers and consultants was a critical part of continuing to be supported and to get guidance necessary to maintain a successful change effort.

The Needed Orientations and Competencies of the Outside Resource Team

This type of participation in a cooperative process of educational change also imposes some challenging demands on the values and skills of the outside consultants. We include in this team the half time "inside-outside" coordinator and the other members of the consultant group who provided the planning and designing and training resources to help the inside team.

Requirements for Contributing to the Initiation of the Effort

1. The first orientation was that the resource team negotiated for the administrator to be a member of the team rather than a resource or "sanction" from "on top".

2. In pushing their belief in peership of teamwork and mutuality of decision-making with the client, the outsiders were expressing a faith that there was not a danger of reducing the standards and quality of work, and that alternatives could be found wherever there was disagreement and need for negotiation.

3. Consultants also had to be ready to risk the eliciting of volunteer participation rather than accepting the temptation to let the administrator appoint and induce participants.

4. A key orientation of the consultants was that they were importing a process of working rather than a package of "how to do it" or an image of a particular desirable product or type of desired change.

5. One important ingredient of the operation of the outside team was their readiness to trust one of their team members to become "an insider" and to "go and live with them" with a trust that they would be represented appropriately in the decisions and plans which evolved.

6. One of the strongest values of the consulting team was that top priority should be given at any time for all of them to be involved in brainstorming designs for training and consulting based on up-to-date and continually changing diagnostic data about the needs and readinesses of the client.

7. Another major aspect of the consultants' orientation was what they referred to as a continuing "tri-focal concern" for paying attention to the personal needs and goals of each participant as an individual, the need to pay attention to each team and to help with its development of skills of collaboration and action-taking, and the need to also keep focal attention on the total system, on its norms, structures, procedures, policies and sanctions and the changes in these which were needed to support successful efforts of individuals and teams.

8. Another requirement of the external team was for them to give priority to the passing on of training and consulting skills to internal teams, which meant actively identifying key resource persons within the system, and providing for helping them achieve training and consulting skills and providing them with internship opportunities to develop and utilize these skills with at-the-elbow help.

9. A continuing commitment of the outside resource team was to pro-

vide needed skills and resource materials to document all the activities of the project, to get data feedback for purposes of guiding the project, and evaluation data to assess the degree of achievement of goals. In addition, the team felt the responsibility for collaborating with the administrator in planning the type of dissemination effort that would help spread the insights and practices developed in the project.

Competencies Required for the Outside Consultants to Support the Implementation and Stablization of Change

1. One of the most important skills needed by the consultant helpers was to help each person and team review the stepwise progress toward goals, to revise plans where needed, and to celebrate success. This sharing of celebration for stepwise progress is one of the most important supports for the maintenance and growth of motivation and energy for the continuation of a change effort.
2. The readiness to be available for consultation at any time, and to maintain office hours when one is easily accessible was a very important practice of the project consultant-coordinator.
3. Taking the initiative to get to the meetings of building teams, to provide them with support for the meeting, and the support for effective and committed functioning was one of the most important activities and skills of the project consultant.
4. Another important support for continuity of effort was the coordinator's continuing presence and initiative at the level of system level interventions, e.g. negotiating for training time, getting items on the central staff agenda, getting approval for expenditures which would support the needs of building teams, and getting the sanctions and participation of key administrators at strategic times and events.
5. The consultant-coordinator had to keep pushing on the non "here and now" priorities such as getting records turned in, getting time set for evaluation activities, getting decisions made about the training of trainers for future continuity, and pushing plans for dissemination and publication before the end of the project time.
6. The coordinator had to feel that it was legitimate for him to call on his consultant teammates at any time for additional consultation help, for the designing of some training activity, or making a presentation to "top brass".
7. A continuing requirement of the coordinator was to use all his interpersonal skills to help the project participants resist new conflicting demands and seductions that appeared at the moment more interesting or pressing than the continuing efforts on the QUEST project. Keeping the organization focused on "carrying through" is one of the crucial areas of responsibility and skill of the outside resource team.

Methods Used to Achieve and Utilize These Startup and Implementation Resources

It may be helpful to review at this point what some of the major meth-

ods and designs were which the resource team utilized to help the participants in the project achieve the skills, and explore the values, and develop the insights and orientations and concepts needed to support the successful startup and implementation of this project. They have all been identified and illustrated at various points in this report. We would just list them as a summary now:

1. Total project conference sessions of all the participants in the project are meant to build a sense of community, to share progress, and to clarify overall policies and goals.
2. Regular meetings of the outside consultant team with the superintendent and his two key administrative associates to provide continuing communication, feedback, and strategy planning.
3. Team training to build the core change teams and to help them with planning and the skills of implementation and progress review and involvement of other resources as needed.
4. Individualized consultation to teams meeting in their buildings on a regular basis.
5. Providing personal-professional consultation to individuals to help them work out whatever professional issues were confronting them, either related to the project or outside the project.
6. Carrying on a continuous "trainer-of-trainer" program by co-designing, co-leading, co-training and co-consulting with inside staff members to help them by providing modeling, and to help them develop skills of carrying on the key aspects of the project after the completion of the relationship with the outside consultants.
7. Linking some of the key insiders to outside professional development advanced training to increase their resourcefulness as inside collaborators and leaders.
8. Providing telephone support at all times from the headquarters of the consulting team.
9. Working closely with the service staff on design and production and distribution of materials.
10. Maintaining a flow of informational and supportive memos to participants.
11. Collecting needs assessment and feedback data by very short paper and pencil tools.
12. Putting in regular time on the commitment to documentation, evaluation analysis, and the organizing of materials for publication.
13. And finally, regular meetings of the total consultant team with their inside-outside "teammates" to provide support and strategy planning help.

With this brief summary of the key values, beliefs, decisions, skills and support activities needed to initiate and maintain a process of educational change, and a brief review of the techniques which are helpful in developing and maintaining these resources, we are ready to turn, in the next chapter, to the probing question of whether, and to what degree, our discoveries in this project, in this particular educational system, have application-value to other organizations.

Chapter X.

Would it Work Elsewhere? Alternatives? Adaptations? Principles?

We believe many of our learnings from QUEST—practices, strategies, designs, tools—can be helpful for both inside change agents and external consultants or trainers wanting to help almost any type of organization examine and improve its functioning. This is especially true if the organization must do its work through the interactive cooperation of coworkers who are organized in subsystems which may be departments, or sections, or schools, or branches, or offices.

We believe the assumptions we have formulated in Chapter III have general relevance, although there will be differences in the appropriate derivations from them. For example, in some organizations the strategic teams are "vertical teams" in the system, in others they are teams of professionals, paraprofessionals, and volunteers who are the key units of collaboration. In some organizations the product is a service to a client, in others, a product for consumers, rather than the learning and growth of the young. But the needs for, and the challenges of, team development and support systems for change efforts, and training for skill development and planning are just as important. In your system the type of accountability may be quite different, but the need for evaluation and feedback procedures will be just as great, as will be the importance of documenting your improvement efforts and recording the successes and failures in your development work.

The strategic tasks to get started on in a change effort may be different in different systems, and may derive from different sources. The impetus may derive from a here-and-now pain, such as worker discontent, or low productivity, or difficulties in goal setting, or disagreements about priority of purposes, or issues about how to cut staff budgets, or poor communication in the leadership structure. Or the push may derive from some personal concern or interest of a powerful person in the system who has desires to innovate or change. Or the impetus may derive from a more general belief and concern that there should be a periodic diagnostic inquiry into difficulties and ways to improvement. Or the push may come from an outside would-be consultant or group doing an effective job of selling a particular "package program" or design for organizational development.

Obviously the origin of the impetus toward a change effort will often influence the nature of the startup tasks as well as the pattern of work. Let's review a few alternative startup tasks:

Some Illustrative Startup Tasks

In the QUEST Project we began with a process development task and a goal exploration and priorities task. In other words, we began with a double task of building an appropriate team in each unit of the organization, and helping that team in every way we could to be diagnostic and futuristic about projecting desirable goals for quality education, and using procedures for prioritizing these goals as a basis for group and individual project planning.

But there are a variety of other ways we could have defined startup tasks, and have in other organizations. For example:

1. We could have started with a more focal interest on a particular educational practice which we had concluded would be a major step toward quality education, for example, a focus on individualization of instruction, or on techniques of classroom leadership, or on new curriculum innovations. We might have achieved a more rapid direct connection with the experience of the students, perhaps at the loss of voluntary involvement of faculty members and the active participation of administrators.

2. Or we could have started with a more focal emphasis on a particular interactive process important for implementing good education, e.g., teacher-student relationships, teacher-administrator communication, school-parent relationships. This would have decreased the probability of the involvement of those in all parts of the system rather than in that particular relationship.

3. Or we might have started with a more formal diagnostic survey, by questionnaire, to identify problems and issues and interests and hopes of the individual participants in the system, with a plan to analyze the data and provide feedback as a basis for selecting action foci. This might have provided a broader base of input about priorities, with a relatively low level of involvement (even irritation) with the project, and a lack of initial voluntary motivational push for working on action.

4. Or we might have started with a particular "organizational development package" which had been developed and worked successfully in other situations as a basis for credibility, for example the interpersonal communication program of the Northwest Regional Lab, or a management by objectives package, or a team-building resource kit, or a series of programmed sessions designed for the training of educational change agents. It is our belief that all of these resource packages might have relevance during the course of our work with the system, for certain clusters of individuals, but that to provide such an intervention for everyone would not lead to appropriate involvement and diagnosis, and so would run a serious risk.

5. Or we might have started with a focus on the individual educational practitioner—teacher or administrator. We might have worked on a program of helping each individual explore their own interest in change effort and develop their own personal project focus, specifically in regard to the performance of their own roles in the system. This approach has the strong advantage of tapping the individual motivation and here-and-now

vested interests of each person, but the great disadvantage of leaving out the development of the peer system and the organizational structure as key support elements of any process of change in individual roles within a social system.

So, although we considered these various possibilities, it seemed to us there was a great advantage in starting to work with the strategic units of the total system, i.e., building units and central office units, and helping each of these units to engage in a "mind-stretching activity" which would maximize innovativeness and thinking about possible goal alternatives, and utilize the processes of interaction and volunteerism in arriving at task priorities and arriving at commitments to devote time and energy to tasks chosen specifically by the particular unit or chosen by the individual with the help of the support team.

Alternative Patterns of Entry and Startup

No matter what task focus is chosen for startup work, there are a variety of alternative ways of relating to the clients system in helping with the tasks. We considered a variety of alternative patterns and have used most of them in our work with other organizations—business, welfare, health, recreation, communities, correctional and therapeutic systems, volunteer centers, cause groups, and higher education systems. Here are some of the alternative approaches to entry and startup which we considered in beginning our work on the QUEST Project. Combinations of them are certainly possible in many situations.

1. A frequent pattern of entry is a diagnosis and feedback project in which a decision is made at a later time whether the team who have been involved in diagnostic work are needed and appropriate to continue with implementation of the implications of the findings. In our practice we have discovered that the use of structured group interviews with five to seven persons at a time, grouped strategically in terms of organizational positions, can be a very effective startup of the process of change due to the kinds of dialogues which can be initiated in the group interviews and the nigh motivation of the interviewees to be involved in considering findings from the interviews and to "get their effort's worth" out of involvement in follow through actions. This kind of process does not get activated by the typical paper and pencil individual questionnaire procedure unless some other activities are going along simultaneously.

2. Another very exciting entry pattern which we have been involved in is the total school-community conference in which board members, administrators, teachers, student leaders and parent leaders work together for a day on issue clarification, goal setting, action planning and the creation of task forces and teams to carry through on action priorities and plans. This process has a great deal to commend it—the high involvement of representation of the total system, the high energy for change created by the interactions, the strong motivation of the task forces to carry through on commitments, and the continuing sanction and involvement of

the top structure including the school board. We believe some elements of this design could have enriched the design of the present project.

3. A third pattern is to start with an intensive training of an inside trainer-consultant "change agent team" which would then carry all the major initiative within the system with consultations to them, but only through them to the rest of the system. The success of such a design depends on the readiness of the system in the early stages to be enough committed to release the time of the essential change team. Usually this is almost impossible to achieve in the early stages of such a process and so the goodwill and good intentions of the internal helpers is eroded and dissipated by the continuing demands of their traditional roles.

4. Another approach would have been the developing of a demonstration in one unit of the system to be the basis for diffusion and adoption by the other parts of the system after having a chance to observe success. It is tempting to be able to put all one's resources into the intensive working through of a top quality demonstration, but there are serious problems. Usually the demonstration site is not seen as representative by many of the units of the system, and also the resources of training and consultation needed to adopt and adapt the learnings of the demonstration to one's own subsystem are usually not available at the time when they are needed.

5. Working with a leader or other agent from each part of the system as a central core to be trained and supported is another type of design. In the case of QUEST this might have meant working with all the principals or a teacher from each building, as the agent for change in that part of the system. A variety of change projects which have used this model have run into serious difficulty because the single person from a subsystem has great difficulty mounting the initiative, coping with the frustrations, and devoting the time needed to have a significant impact. The building team utilized in QUEST seems to us a minimum sized unit to utilize in developing a significant change impact.

6. Another procedure is to be ready to work with any subparts of any system which is "ready to go", such as any department of the high school or any cluster of upper elementary or lower elementary teachers in elementary school buildings. In the case of QUEST this would have meant bypassing the leadership role of the administrators and working with any unit that expressed the readiness to collaborate. This might have been a feasible alternative pattern for getting meaningful teams, but would have risked lack of support.

7. Another alternative would have been to expand the concept of the team to include representation of all the significant participants in the educational process of the building. This would have included some students and parents as well as teachers and administrators. Probably at the high school level this would have been particularly advantageous. It might have been a very positive model at all levels. There certainly would have been difficulties of including this larger number of persons in the subsidized training activities, and in finding the necessary meeting times for the continuing efforts. But some creative adaptations might have been worked on to greatly enhance the strength of the project.

8. Another concept which has worked in supporting change in some systems is to develop natural clusters of teams that have a special working relationship and accountability relationship and consultative relationship to each other. In the case of QUEST this might have been teams in closest proximity to each other, or a junior high and its feeder elementary schools, or teams which were working on the most similar types of projects. This procedure obviously has the advantage of permitting more frequent and intensive inter-stimulation between teams without the time and energy of large conference sessions.

We see all eight of these patterns as feasible working relationships between an external consultant group and an organizational system in working out the process of entry and carry-through support. As we have reviewed our own experience with QUEST we feel the building team and the central office team were a very sound concept. We feel we might have explored the possibility of a startup school community conference, and explored the feasibility of relating selected influential students and parents to teams either as full members or as affiliated and advisory members to be involved as fully as possible.

As we have reviewed our experience with the processes of entry, of startup, and of support for follow through, several principles have emerged for us as key guidelines in our own continuing professional work. We share them with you here.

Some General Principles of Startup of Organizational Change

1. The establishing and full utilization of an inside-outside peer team for the planning, problem solving, steering and shared leadership of activities.
2. The involvement in diagnosis and goal setting of persons from all levels of the system who will be worked with to cause the desired outcomes.
3. Some type of initial participation of micro-exploration of what it might be like to work together on this kind of effort.
4. Very early training in the concepts and skills of collaboration in order to build strong internal collaborators rather than facilitating dependency.
5. Modeling, in the behavior of the consultants, the reciprocality of influence, openness of communication, commitment to inquiry and learning, and creativity in finding alternatives and resolving conflicts.
6. A clearly projected philosophy and time perspective for collaboration and withdrawal.
7. An established trial period for working together and reviewing and revising and consideration of renewal of contract.
8. Establishing a norm and procedures for "process reviews" as part of task work.

Some General Principles of Support for Follow Through Work on Change and Maintenance

1. The linking of goals to very specific stepwise tasks and plans.
2. Openly shared commitment about division of labor and responsibility for action steps and time schedules.
3. Opportunities for anticipatory skill practice and simulation before reality risk taking.
4. Peer and consultative support at the risk taking times.
5. Consultative review of progress with celebration and revision.
6. Shared participation in evaluation of process and task work and the deriving of implications from the evaluation.
7. Continually working to help the client internalize the methodology of action-research, training, and giving and receiving consultative help. A training-of-trainer relationship to key insiders.
8. Continued efforts by the outside consultants to link the client system to relevant outside resources.
9. Continual examination by the outside helpers of their own working relations, decisions, motivations, and operative values.

With these operational principles in our minds and our bones, we believe any person, or team of persons, can be a more effective resource in helping any group or organization work on the ever present challenges to improve productivity and service. The quest for quality is a continuous responsibility, opportunity, and source of joy.

Helpful Sources of Ideas, Concepts, Models, Techniques

All of us are leading very filled lives in our part of the educational system and process. We know that many important ideas are being developed and expressed by the scholars of educational theory and practice. We also know that important variations and innovations in classroom teaching and school administration are being tried out and reported about. The time to read is so short but so important. What are the most important and helpful things to read?

Below we have described briefly 22 readings which are easily available and which we have found helpful in our thinking about Quest for Quality in Education. In addition we'd like to refer you to: NTL Learning Resources Corporation, 2817-N Dorr Ave., Fairfax, Virginia 22030. They will be glad to send you a listing of resources from a number of publishers, carefully selected to be of value to educational trainers, consultants, administrators, and teachers.

1. Benne, Kenneth, Bradford, Leland, Gibb, Jack, Lippitt, Ronald. *The laboratory method of learning and changing: Theory and applications.* LRC, 2817-N Dorr Ave., Fairfax, Va. 22030, 1975.

This is the basic volume on laboratory education, with special chapters contributed by leaders in the field. It is primarily for those interested professionally in training and consultation. The chapters include applications to personal growth, group development, organizational and community development. (about 800 pages, hard cover)

2. Bennis, Warren G., Benne, Kenneth D., Chin, Robert. *The planning of change* (second edition), New York: Holt, Rinehart, and Winston, Inc., 1969.

This is a well organized basic resource book with about 40 contributions to various facets of the theory and practice of facilitating change and dealing with resistance to change in all types of systems. (627 pages, hard cover)

3. Chesler, Mark and Fox, Robert. *Role-playing methods in the classroom*, Chicago, Science Research Associates, Inc. 1966.

This little manual is the best resource book and how-to-do-it book on the great variety of uses of role-playing as a part of participatory classroom teaching. Over 100 situations found useful by teachers are included. (86 pages, paperback)

4. Fox, Robert S., Lippitt, Ronald, and Schindler-Rainman, Eva. *Towards a Humane Society: Images of Potentiality*. 2817 N. Dorr Ave., Fairfax, Virginia 22030: NTL Learning Resources, 1973.

This is a valuable resource for future thinking, long range planning, and goal setting about education and community development. Two chapters present the methods of "image of potentiality" trips into the future and use of force field diagnosis and other methods of action planning. (100 pages, paperback)

5. Fox, Robert, Luszki, Margaret B., and Schmuck, Richard. *Diagnosing Classroom Learning Environments*. Chicago, Science Research Associates, 1966.

This is a unique tool kit of methods developed by a teacher-social scientist team to assess classroom learning climates, get and give feedback between students and teachers, discover outside influences on learning and become sensitive to the self-concepts of students. Examples and guidelines for using the tools are provided. (131 pages, paperback)

6. French, Wendell L., and Bell, Cecil H., Jr., *Organization development*. Englewood Cliffs, New Jersey, Prentice-Hall, Inc., 1973.

This is a small very well written overview of the various aspects of organization functioning and development, with a good analysis of types of interventions in introducing improvement. (207 pages, paperback)

7. Lippitt, Gordon. *Organization renewal*. New York, Appleton-Century-Crofts, 1969.

This is both a framework for understanding the school as an organization, and a guidebook on how to develop and organize the strategies and procedures of improving and renewing staff and organizational functioning. The role of facilitator and stimulator of renewal is presented. (321 pages, hardcover)

8. Fox, Robert S., Schmuck, Richard, Van Egmond, Elmer, Ritvo, Marian and Jung, Charles. *Diagnosing professional climates of schools*. 2817 N. Dorr Ave., Fairfax, Virginia 22030, LRC, 1973.

This is a resource book and a tool kit (30 instruments) for administrators and staffs to use in assessing their own operation of a school building, with helps on using the data for planning and for improvement of staff relations and leadership. (152 pages, paperback)

9. Lippitt, Ronald. *School psychology: a resource for elementary and secondary educators*. 855 Broadway, Boulder, Colorado 80302, Social Science Education Consortium, 1975.

This document presents 10 areas of improvement of the quality of education through use of the resources of applied behavioral science. These include curriculum innovation, classroom methods, staff development, school climate, and school-community relations. (54 pages, reprint series)

10. Lippitt, Ronald and Schindler-Rainman, Eva. *Designing learning experiences: planning charts*. 5605 Lamar Rd., Washington, D.C. 20016, Organization Renewal, Inc., 1973.

This small planning tool provides a conceptual framework, guidelines, and worksheets for the planning of all types of meetings—learning sessions, planning sessions, action planning sessions, etc.

11. Lippitt, Ronald and Lippitt, Gordon. *The consulting process in action*. 1916 Cambridge Rd., Ann Arbor, Michigan 48104: Human Resources Development Associates, 1975.

This is a condensed presentation of the work of both the external and internal consultant, with description of 4 phases of the consulting process and some 14 typical foci of consultative interaction and 8 different roles of the consultant. (20 page reprint from book in preparation)

12. Lippitt, Ronald, Watson, Jeanne and Westley, Bruce. *The dynamics of planned change*. New York, Harcourt Bruce Jovanovich, Inc., 1958.

This is the volume which introduced the concept of "change agent" and "planned change". It presents a comparative analysis of the processes of facilitating change in individuals, groups, organizations, committees and larger systems. The phases of the process of change and resistance to change are analyzed. (312 pages, hardcover)

13. Miles, Matthew (ed.), *Innovation in education*. New York, Columbia University Teachers College, Bureau of Publications, 1964.

These are case studies, analyses, theories, strategies about the process of change in all aspects of education—curriculum, teaching, administration, materials, organization. It is a basic source book. (689 pages, hardcover)

14. Schindler-Rainman, Eva and Lippitt, Ronald. *The Volunteer Community: Creative use of human resources*. 2817 N. Dorr Ave., Fairfax, Virginia 22030: LRC, 1975.

With the great increase in the school volunteer movement, and the concern for the involvement of the community in the life of the school, this is the first basic book on the recruiting, training, and rewarding of volunteers. (148 pages, paperback)

15. Schindler-Rainman, Eva and Lippitt, Ronald. *Team training for community change: concepts, goals, strategies and skills*. 2817 N. Dorr Ave., Fairfax, Virginia 22030: LRC, 1972.

This is a case study of a team training extension course, University of California, Riverside, with detailed description of training designs and tools, procedures for supporting team action in the community, and evaluation of results. School system teams were part of the program. (75 pages, paperback)

16. Schein, Edgar H. *Process consultation: its role in organization development*. Reading, Massachusetts: Addison-Wesley Publishing Co., 1969.

This is a pioneering book on the various types of process problems (e.g., decision-making, leadership, intergroup, member roles, etc.) which effect efficient task work in any organization, and an exploration of the various kinds of consultation that can help cope with these difficulties. (147 pages, paperback)

17. Schmuck, Richard A. and Schmuck, Patricia A. *A humanistic psychology of education: making the school everybody's house*. 285 Hamilton Ave., Palo Alto, California, National Press Books, 1974.

This is practical inspiring reading about the basic principles and methods of humane education. The approaches to learning, classroom climate, teacher role, and school building operation all fit together into a feasible picture of what education could be for our children—and their parents. (387 pages, paperback)

18. Schmuck, Richard A. and Miles, Matthew B. *Organizational development in schools*. 285 Hamilton Ave., Palo Alto, California, National Press Books, 1971.

This is a research based guide to effective strategies or organizational leadership. A basic book for administrators. (264 pages, paperback)

19. Schmuck, Richard, Chesler, Mark, and Lippitt, Ronald. *Problem solving to improve classroom learning*. Chicago, Science Research Associates, 1966.

This resource booklet comes out of intensive consultation with many teachers in different elementary and secondary teaching situations, including cross-cultural and inter-racial groups. Procedures for involving students in diagnosing and improving their own classroom life, setting goals, and evaluating progress are presented. (88 page paperback)

20. Schmuck, Richard and Schmuck, Patricia A. *Group processes in the classroom* (second edition). Dubuque, Iowa, Wm. C. Brown Co.

This is probably the best single book on what goes on in the dynamics of classroom life and what are the conditions of a good learning process and effective teaching behavior. It is well organized, good framework of concepts, many practical ideas and examples. (217 pages, paperback)

21. Rubin, Louis J. (ed.) *Improving in-service education*. Boston, Massachusetts, Allyn and Bacon, Inc. 1971.

This is a collection of papers about problems and approaches to on-the-job learning for teachers. It is a good basic resource book on the rationale and designs for teacher professional development. (284 pages, hardcover)

22. Thelen, Herbert A. *Education and the human quest*. Chicago, University of Chicago Press, 1960.

One of the most exciting volumes for any teacher or administrator on what quality education is all about, and what it could look like in action if we "put it all together". (228 pages, paperback edition)

Chapter XII.

The Tools You Might Need

As you get involved in this kind of activity, you will be developing your own tools, but we believe there is great value in having some examples of tools that have worked for us...which you may want to adapt and modify for your own use in similar experiences.

We have included examples of Memos, Instruments, Time-line forms, Force-field forms, Stop-Action Process questionnaires, Post-Meeting Reaction forms, Meeting plans, Startup ideas and activities, and other diagnostic tools. This section is not intended to be an exhaustive or complete "tool box" of resources used during the QUEST Project. Instead it represents some selected examples of tools and instruments which were used at various stages of the project. For additional guidance and examples of tools and instruments which are particularly useful for educational settings we suggest *Diagnosing the Professional Climate of Schools* by Fox, Schmuck, Van Egmond, Ritvo, and Jung (see Chapter 11).

An important concept in using written instruments of any kind is that the design flow of the total experience be regarded as an important "tool" in itself, which in a real sense, dictates the appropriateness of what is the most effective intervention, instrument, or tool to use at a particular moment within the event. Equally important is the ability and willingness to create one's own tools and instruments (sometimes on-site) to meet the needs of the moment! We find that a "ditto" machine, with an adequate supply of "spirit masters", spirit fluid and paper is invaluable to the success of our training experiences and evaluation activities.

The following annotated "samples" are selected from three phases of the QUEST Project: 1) Start-Up. 2) Support Phase. 3) Evaluation.

Phase I. START-UP

EXHIBIT I: This was the memo which invited the principals to an introductory QUEST meeting. An important aspect to this communication is that it carries information about hoped-for activities beyond the meeting which is being announced. It indicates a continuity beyond the meeting which makes the meeting more than an end in itself.

EXHIBIT II: Agenda-Meeting Flow for QUEST Start-Up Meeting With Principals.

This is an example of a typical Meeting Agenda Flow Sheet, used to keep ourselves "on track" and on schedule. It is a guide for the leaders of the meeting and was given to participants following the meeting as a reminder of what took place and as a model of how to organize for an effective meeting.

EXHIBIT III: The nature of the QUEST project made it hard to predict or to guarantee specific outcomes, because what was to happen depended on the creative involvement of those who decided to "buy in". But neither could we say to people the outcomes would really depend on their choices of goals and plans, because this would not allay their anxieties. So we generated a list of "Possible Outcomes" to suggest examples of the kinds of things which might occur if they became involved.

EXHIBIT IV: We felt it was important for people to commit themselves to some clearly stated investment, if they were to become involved in the project. We wanted people who were really ready to go. We also felt it was unfair to ask people to get involved without stating the kind of involvement we wanted and felt would probably be necessary.

EXHIBIT V: This diagnostic tool helped us to gauge the interest of the 23 principals before they left the introductory meeting. We needed to have a sense of where we stood in terms of their interest. This "Opinion-sharing Sheet" was also suggested as a model of one they could use with their faculty to test their interest after the principals had carried the information about QUEST back to their faculties. We had lots of extra copies on hand for them to take.

EXHIBIT VI: This "stop action" form was utilized during the start-up training workshop. "Stop action" forms have been mentioned in the earlier text. We used them frequently to help working groups look at how they were working together in order that they might become more skillful at working together and at leading other groups in general.

EXHIBIT VII: The concept of Force Field analysis was introduced by Kurt Lewin in the early stages of applied group dynamics. It was a conceptual tool and a method of identifying and assessing the field of forces in any equilibrium situation.

A force field can be a helpful tool in planning. For example, once a goal has been set it can be force fielded to help further define the goal and the resources and the pitfalls. This is done by stating the goal and then listing (on the left) all the things happening now which will help us get there, and listing (on the right) all the things which will be restraining or blocking us from getting there. This exhibit represents a special application of this tool, with a greater individual focus. Before people plunge into planning for action it is important for them to explore the nature of their commitment and what they feel are the chances of success. This work sheet helped us get at those ambivalencies.

EXHIBIT VIII: When any group is involved in planning it is hard to keep track of where it is in the planning process. This flow sheet was utilized to help people visualize the process they were engaging in and to keep track of where they were. The questions next to each "step" represent most of the important questions to answer before moving on to the next "step" in the process of planning for real action. Our experience is that these questions come back to haunt us later if we don't attend to them at the first

opportunity in the planning process. The "Action Planning Steps"* are merely a general guide and road map, not a detailed instruction sheet.

EXHIBIT IX: This evaluation and feedback tool was utilized during the second workshop. Its intended purposes are listed on the first page. It is typical of many such questionnaires which we used during the life of the project to obtain feedback and guidance from all the participants without a large expenditure of time.

EXHIBIT X: We have been involved a lot, in all sorts of organizations, with helping people discover what they want to do (set goals) and what action to take to make those things actually happen (develop action plans and implement them). This process starts with goal setting. Our own research showed that groups tend to focus on the problems as a way of deciding what to do. The results became quickly obvious once we began to objectively observe this process. Every 5 minutes you could detect the group energy as lower than before. People would become steadily more depressed and overwhelmed as they listed problems until most of the group was immobilized and anyone else became frustrated. We discovered that by starting with what each person would like to see happen (rather than like to see not happen), unleashed a lot of energy, hope, excitement and creativity which carried the group well on into the action planning. This method was developed and reported by Fox, Lippitt, and Schindler-Rainman in their book, *Toward a Humane Society* (See Chapter 11). This exhibit represents a work sheet based on this potential vs. problem concept.

EXHIBIT XI: When planning for action is is important to have a detailed statement of how and when each step of the total plan is to take place. Even more important, it is important to know who is going to be responsible for seeing that each step does happen. This exhibit, containing 3 "time line sheets" illustrates the format we used and the kind of information that was necessary to nail down the *Action* part of the plan.

PHASE II: SUPPORT

EXHIBIT XII: This is an example of a type of document which was very important to the project planning team as we continually planned, strategized and went into action. This type of document enabled us to record our action decisions, set deadlines for ourselves and attach individual responsibilities to each event which had to take place. It was much easier to revise our calendar of events when unavoidable setbacks occurred.

EXHIBIT XIII: This represents a typical memo reminding change teams of the next workshop. These memos *always* carried a concise statement

*Developed by Fred Feitler along with Charlotte Mappus, Sid Mann, Ed McHale and Larry Lippitt at the Office for Educational Planning, Elmira, N.Y., 1970.

of the goals for the event. Occasionally they carried a news note such as this one.

EXHIBIT XIV: This type of meeting or workshop planning form was utilized by the training staff to plan all training events and other working meetings. In addition all participants were taught to utilize this type of organization in planning events and meetings within their own schools. This form represents a powerful approach to planning effective meetings. This is adapted from a 4 page guidesheet for planning meetings developed by R. Lippitt and E. Schindler-Rainman (See Chapter 11).

EXHIBIT XV: One of the best ways to unleash creative and positive energy within a system is to get people to *really* share their inventions and creative ideas. This is not a necessary and sufficient condition for creating major organizational changes, but it is one power which can be utilized for that end. The first page of this Exhibit illustrates the kind of introduction people often need in order to warm up to this activity. In addition we usually brainstorm the reasons we don't usually share our ideas and the reasons why it would be good to. Then the second page of this exhibit represents an interview form which helps standardize the form of the information that is recorded. This is important because it facilitates retrieval of the ideas. A booklet of 50 or 100 such documentations can be created in an hour.

EXHIBIT XVI: Here is another example of a typical Stop Action form which was utilized during a support and follow-up workshop towards the end of the project. Teams were frequently asked to take 10 minutes but not more than 15, to notice how they were working together and to identify anything which might help them to function more effectively. The Stop Action questionnaire is an effective way to help people stop and pay attention to group process.

EXHIBIT XVII: This is a meeting and workshop planning form. It was used extensively by the QUEST training staff when planning any and all workshops and meetings. All QUEST change teams began to utilize this format for planning any meetings or learning events with the faculty. The Administrators and Special Services resource people utilized them for conference and inservice planning throughout the system. We found it leads to an organized and well run meeting to know the times during a specific event when each activity is to take place and who is responsible for it happening, with a reminder of any necessary materials.

EXHIBIT XVIII: Here is another example of a workshop evaluation form which was utilized frequently to give the staff a sense of future needs and ways to do a better job in the future. These sorts of diagnostic tools were invaluable in helping the coordinator to meet existing needs and monitor the progress of the project and of individual teams.

EXHIBIT XIX: This illustrates a typical memo utilized to remind QUEST participants of meetings or to announce meeting dates. Two key elements

are: 1) what the agenda will be or will be likely to include, and 2) a reminder of any preparatory work necessary for the meeting.

EXHIBIT XX: This chart is a conceptual representation which we used to graphically organize the *activities* of the project. It was important that people could grasp the total scope of activities and visualize how they related to one another. It was also important that the processes in which we had become involved were seen as a circular or continual renewal effort, not a one-shot deal.

EVALUATION PHASE

EXHIBIT XXI: The evaluation coordinators in each school were called Documentarians. This term was more appropriate, since they were continually involved in the process of documenting the total effort as we progressed. Each team chose a member to be the documentarian. This exhibit is a memo calling a meeting of the documentarians. As with most other meeting memos, it states the major items for the agenda along with time and place.

EXHIBITS XXII AND *XXIII:* These are examples of cover letters which accompanied evaluation instruments which teachers and students filled out at the beginning and end of the project. They give some background information, explain that that information will not be kept on a personal basis and refer the person to the documentarian for further questions.

EXHIBIT XXIV: This memo represents an attempt to review for the documentarians what we have been up to so far and to begin preparing them for the final evaluation push in the spring. It was important to keep their documentarian role before them periodically, because there was so much else to do that this activity might be forgotten too frequently.

EXHIBITS XXV AND *XXVI:* are questionnaires utilized to identify differences in attitudes, perceptions and activities in teachers, principals and students. We modified them once, to improve them. We still believe there is much room for improvement. A lot of work is involved in tabulation of this kind of questionnaire.

EXHIBIT XXVII: This evaluation instrument proved very informative and valuable. It renders important information with a minimum of effort. It is based on a lot of sound research, theory and test construction principles. We have often utilized it to provide information to teams, staffs and other groups we have worked with as part of our intervention strategy in helping people to diagnose and understand how their school or organization is functioning and how they want it to be functioning.

EXHIBIT XXVIII: The use of this form can be time consuming at first, and it takes a day to train people to utilize it properly. On the other hand, it captures very important and basic kinds of information that usually get lost in many such projects. For example, the only way to know if decision

making procedures change or if problem solving skills increase or if goals are stated more clearly at meetings, or if use communication skills increase during faculty meetings, is to gather this sort of information regularly over the duration of the project on an observational basis. Use of this documentation form fills a large hole in many evaluations. When a pre and post measure is taken, one large question often remains. What happened in between? What processes took place? How did it happen? What did it look like? Use of this form documents what happened and how it looked while it was happening.

EXHIBIT XXIX: This questionnaire was added to the total evaluation effort as we became aware of the need to collect quantifiable information on the personal/professional growth aspect of this project. We had not planned this one originally. It was a very useful tool. The concern reflected here was a basic element to the success of the QUEST project.

EXHIBIT XXX AND XXXI After the project was officially ended and we had done all we could to help people identify their learnings and to focus on how they were going to be able to carry on many of the skills, concepts and practices acquired during the project, we felt it would be exciting and telling, to get personal and anecdotal accounts from participants. This exhibit is the outline utilized in interviews with as many QUEST team members as we could reach, during the last month of school.

EXHIBIT XXXII: What goes on in a group us a conceptual input which seemed to be valued by our teams as they developed their awareness and skill as teams.

EXHIBIT I.

SUBJECT: QUALITY EDUCATION THROUGH STAFF TRAINING: QUEST

FROM: W. D. Edmundson, Region Seven Superintendent

TO: Region Seven Principals

DATE: January 29, 1973

In response to a proposal submitted last summer the McGregor Fund has made a grant of $58,480.00 to Region Seven for a staff training program.

As announced at our last principals' meeting you are invited to an introductory meeting to be held at *Finney High School in the staff lunchroom on February 15 at 12:15 p.m.* Lunch will be complimentary.

Dr. Ron Lippit and Dr. Ken Cowing of Human Resource Development Associates of Ann Arbor will be with us to do the introductory session.

Following this, interested principals are requested to make presentations to their staffs and, on the basis of interest, apply for participation in the program which will run from early March through January 1974. Please make tentative plans during the period February 5 to February 16 for a date on which you can discuss the proposal with your staff.

The program is budgeted for participation of eight schools which will be selected from among those applying.

Park in the Cannon parking lot off Guilford (off Warren).

WDE:sd

EXHIBIT II.

AGENDA—MEETING FLOW: QUEST Meeting, February 5, 1973

1:00 Introductions and Greetings
"Why we're here today,—and why I'm excited about this program.."

1:15 Total Concept Rationale ("Helping schools help themselves..")
Larry Lippitt

1:30 Image of Potential .. one year from now
5 minute explanations, 5 minute personal jotting, 10 minute brainstorm; i.e. *quality* of interaction between individuals, administrative structures, curriculum, etc.

1:50 What are the factors and forces BLOCKING the above?
(4 minute personal jotting, 10 minute listing. Explanation "Why we did this .. why we're cutting it")

2:05 Possible Outcomes of a program like this .. (linked into their ideas and expectations).
"What it would mean for you to become involved." (Distribute prepared sheets)

2:20 Discuss around tables .. reactions, important issues, questions for clarification .. information needed in order to make a decision.

2:30 List questions and respond.

2:40 Internal dialogue . . . re: making a decision right now.

3:05 Report out and discuss

3:15 "Where do we go from here?"
and what for..etc.
Fill out Opinion-Sharing Sheet
Share as a model for presenting to staff.

EXHIBIT III.

Possible Outcomes of QUEST

Teacher and administrative personnel

improve small group leadership and organizational planning skills.

Teachers begin to add new behaviors to teaching styles which

help children to establish priorities, make decisions, set learning goals, which create more open learning climates, and which improve student leadership skills.

Teachers initiating cooperative attempts to reach unmotivated classes

Total faculties set goals for school and implement action plans.

Teachers take responsibility for own in-service days.

School personnel establish ways to share resources within

and between schools... i.e., what works, outside speakers, etc.

Trained teachers become members of other project committees

and increase the likelihood of success due to leadership and planning skills.

School personnel working together to solve problems.

Teachers working with principals in a more open and trusting manner.

This list is meant to provide a further picture of what QUEST involvement might mean. It is a list of the sorts of things which might occur rather than a complete list of guaranteed outcomes.

11-13-75—QUEST

EXHIBIT IV.

Tentative Commitments

1. To the QUEST goals and objectives.
2. Time and personnel.

—3-day initial training session (March, 1974).
—1-day follow-up support session (middle March, 1974).
—1-day follow-up support session (early April, 1974).
—1-day follow-up support session (early May, 1974).
—5-day further training session (late August, 1974).
—continued follow-up support sessions (until January).
—for the team of 3—6 persons to meet in their schools regularly to implement meaningful action steps.

3. Commitment to regularly scheduled periodic meetings of QUEST team representatives.
4. Willing participation in the evaluation efforts.

11-8-73—QUEST

EXHIBIT V.

"QUEST" OPINION-SHARING SHEET

Each staff member is invited to share in the decision-making process regarding our participation in the QUEST.

(Quality Education Through Staff Training) Program

Please indicate your opinion by checking the appropriate box:

1. ( ) YES, I'm enthusiastic about participating!
2. ( ) I see some value in our staff participating.
3. ( ) It sounds like a good idea, but I don't think our staff is ready at this time.
4. ( ) I have reservations about our staff participating.
5. ( ) NO, I don't think we should participate.

Please state, briefly, why you checked where you did:

EXHIBIT VI.

April 18, 1973 Workshop

Stop Action #1
(Be as specific as possible)

1. What behaviors/approaches were helpful:
   a) on the part of the consultants?
      "Asking questions in attempt to understand better the situation of consultees." (Sample answer)
   b) on the part of the consultees?
      "Responding to questions." "Valuable sharing and openness.." "Giving consultants overview of what had happened."

2. What behaviors/approaches were not helpful:
   a) on the part of the consultants?
      "Asked some question which impeded discussion of consultees"
   b) on the part of the consultees?
      "Very brief "back patting"—but soon turned back to focus"

EXHIBIT VII.

Now that our team has chosen our goal for action, what are the ambivalences you feel? We all have various internal voices which we consult as we make decisions. These voices, pro or con any decision, are called the internal dialogue. Stop for a minute and record your internal dialogue as you consider working to realize the goal you and your team have decided upon. Below is a force field analysis. Use the form if it helps you.

Forces supporting or restraining my working to realize our team goal:

SUPPORTING	RESTRAINING
	within me
1.	1.
2.	2.
3.	3.
	within the team
1.	1.
2.	2.
3.	3.
	within the schools
1.	1.
2.	2.
3.	3.
	outside the school
1.	1.
2.	2.
3.	3.

EXHIBIT VIII.

ACTION PLANNING STEPS

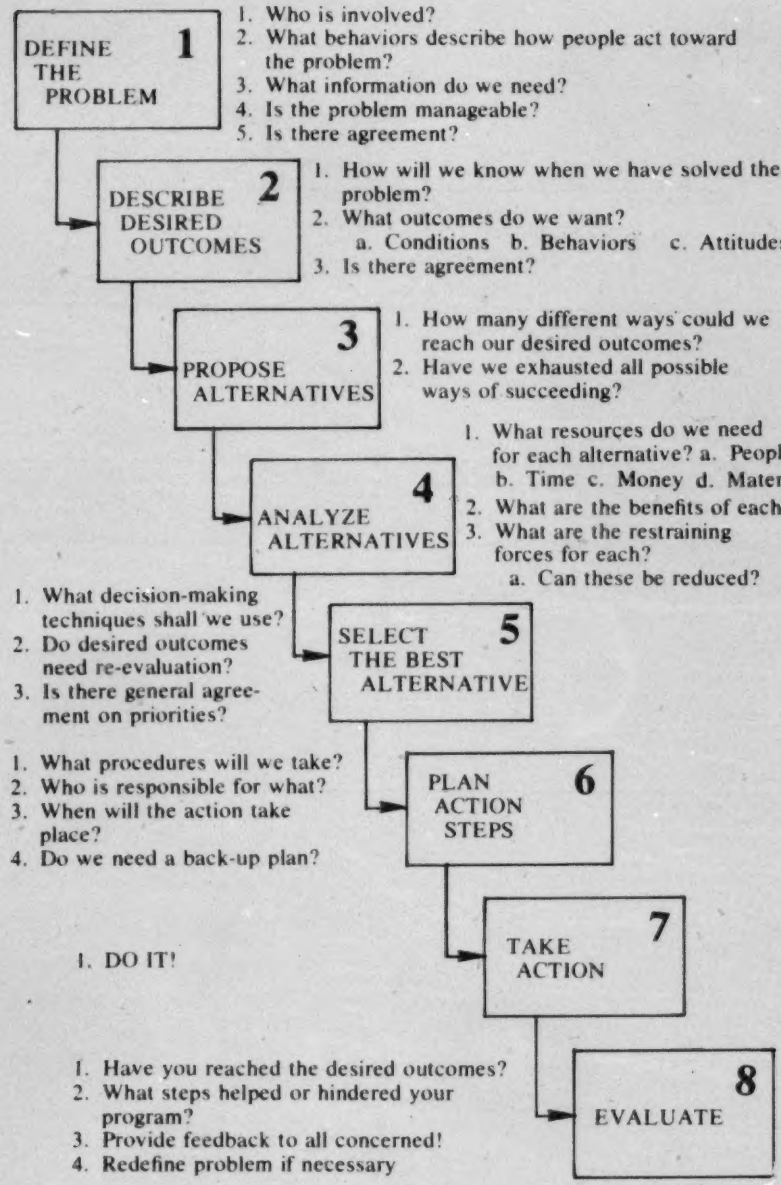

DEFINE THE PROBLEM 1
1. Who is involved?
2. What behaviors describe how people act toward the problem?
3. What information do we need?
4. Is the problem manageable?
5. Is there agreement?
DESCRIBE DESIRED OUTCOMES 2
1. How will we know when we have solved the problem?
2. What outcomes do we want?
a. Conditions b. Behaviors c. Attitudes
3. Is there agreement?
PROPOSE ALTERNATIVES 3
1. How many different ways could we reach our desired outcomes?
2. Have we exhausted all possible ways of succeeding?
ANALYZE ALTERNATIVES 4
1. What resources do we need for each alternative? a. People b. Time c. Money d. Materials
2. What are the benefits of each?
3. What are the restraining forces for each?
a. Can these be reduced?
SELECT THE BEST ALTERNATIVE 5
1. What decision-making techniques shall we use?
2. Do desired outcomes need re-evaluation?
3. Is there general agreement on priorities?
PLAN ACTION STEPS 6
1. What procedures will we take?
2. Who is responsible for what?
3. When will the action take place?
4. Do we need a back-up plan?
TAKE ACTION 7
1. DO IT!
EVALUATE 8
1. Have you reached the desired outcomes?
2. What steps helped or hindered your program?
3. Provide feedback to all concerned!
4. Redefine problem if necessary

EXHIBIT IX.

FEEDBACK FOR QUEST

Staff and Region Administration Staff
May 22, 1973

Team_____

Feedback for May QUEST Meeting:

THE PURPOSE OF THIS FEEDBACK TOOL IS TO GIVE FEEDBACK AND GUIDANCE:

—for the planning of future training events;
—for the team-support activities of Larry Lippitt and HRDA Staff;
—for improvement of role-function of the Region 7 Administrative leaderships;
—for the use of building teams and individual team members to improve their functioning.

SUPPORT ACTIVITIES:

1. Three phrases I would use to describe Larry's support role in the QUEST Project.

   (a) with team:

   (b) with individuals:

2. Some particularly helpful things I have observed Larry doing have been:

3. I wish we had more of:

4. In my opinion, we need less of:

TEACHING ACTIVITIES (HRDA STAFF):

1. The training events thus far have been helpful in the following ways:

2. The kinds of training I feel our team needs more of are:

3. Kinds of training I personally feel the need of are:

BUILDING TEAM:

1. Phrases I would use to describe my team are:

2. Phrases I think my colleagues in the building would use to describe our team are:

3. The most important problems we need to do something about in our team functioning are:

4. My feelings about participation in QUEST, regarding long range potential payoff, are thus far:

Highly Optimistic	Optimistic	Neither	Pessimistic	Quite Pessimistic

5. My feelings about progress we have made thus far are:

Quite displeased, unsatisfied	Displeased	Neither	Pleased	Quite pleased and satisfied

6. My personal feelings about our team's "teamwork" are:

Highly satisfied	Satisfied	Neither	Dissatisfied	Quite dissatisfied

ADMINISTRATIVE STAFF:

To me, the most important strengths of the superintendent's role are:

1. I have observed the administrative staff being supportive in the following ways.

2. Kinds of support from the administrative staff that seem to be lacking or that I would like more of are:

3. In the leadership of the QUEST Project for Region 7, I would describe the style of the superintendent as:

4. Two recommendations for strengthening his leadership, from my point of view might be:

GENERAL:

1. List some of the possible "payoffs for students" that you see growing out of the QUEST activities and projected plans.

2. What do you see as potential "payoffs" for the total building staff, growing out of the QUEST Activities and projected plans:

3. The most important values to me of participating in the QUEST Project, so far, are:

EXHIBIT X.

QUEST Workshop

Images of Potentiality Trip

Observing Educational Innovations–March 1974 October

What I See Myself Doing Which Pleases Me	What is Happening as Result Of Our Team Effort That Pleases Me
Teacher-Student Classroom Interactions	
Interaction Between Staff Members	
Interaction Between Students	
Interaction Between Teachers and Students	
Ways Classrooms Are Set Up For Learning	

School _____ Name _____

QUEST-3/13/73

EXHIBIT XIA.

Macomb School

Goal: To transfer leadership from the QUEST team to staff members by November 1.

9-4 - 9-17	9-18 8:15 am	9-26 3:30 pm	10-3 3:30 pm	10-4 3:15 pm	10-10 8:15 am	10-17 2:00 pm	11-6 3:30 pm	11-7 3:30 pm
Contact new staff members	QUEST team meeting	General meeting. Mention will be made of committee changes	Emily Buus Carol Libby explain their function and problems	QUEST team meeting. Distribution to staff of tabulation	QUEST team meeting with Larry.	Early dismissal this meeting. Staff into groups (5-6) of individual's chosen area of interest	QUEST team eval-uation	Teacher meeting. Group's progress reports

EXHIBIT XIB

Marxhausen School

Time	Activity	Who's Responsible	Materials and Equipment
9-5-73 1:00 p.m.	QUEST team meeting Plan for presentation of extension of goal to staff	Principal Byrdell	Time line Notes from QUEST Workshop

9-12-73 3:30 p.m.	Staff to discuss concerns Re: self contained and classroom management.	Pauline and Ed Staff	Vehicle for feedback, re: concerns Exchance of things that work.
9-19-73 3:30 p.m.	Reading Workshop	Byrdell K. Shirley Warren Betty Mathis	Conduct meeting Binn manuals Teacher-made materials Hardware
9-20-73 10:45 a.m.	QUEST team meeting w/Larry Lippitt to assess progress and share concerns	Ophelia	Conduct meeting Evaluation techniques Notes re: all previous meetings

EXHIBIT XIC

Goal: To have a smooth start-up in the fall and transition to the new team approach

Objectives: Team building amongst selves via attention to group discuss
Evaluating needs of the department via survey
Clarify our role in transition to newtom approach

Date	by Sept. 6	by Sept. 13	by Sept. 21	October 1
what	Prepare a notebook for the new department head of Psychological services and meet with her to bring her on board	Clarify with Administration our status and involvement in the implementation of team approach CIS our team involved in planning & implementation.	Orientation meeting between Team & Director Assistants and Department heads and our O.D. consultant	Plan the first joint Staff meeting outcome and O.D. consultant
how	Go over minutes and compile the summary, call her and make a date	Meet with Assistant Directors (Lila and Chuck)	in the large conference room	small conference room
Who	Carol and Elenor	Elenor	Bill will call people and get the date set.	Carol will be responsible for reminders, room and materials

130

EXHIBIT XII

Region Seven

QUEST Time Line
(Revised)

1973

October 24	Memo and calls to QUEST principals regarding start-up meeting (Larry).
October 24	Memo and calls to Documenters regarding start-up meeting (Larry).
October 30 (1:15)	QUEST principals' meeting (where are the teams and November 13th second year QUEST presentation to Region Seven principals) (Larry and Dean).
October 30 November 15	Team meetings begin (use phone follow-up) and be at elbow for help and support (Larry and Ken).
October 31 (9:00)	Documenters' meeting (Larry).
November 13 (1:15)	Region Seven principals' presentation, by Dean, Larry, QUEST principals and teachers, about "QUEST 2".
November 13 November 20	Processing evaluation data (Larry) for evidence of stewardship and anecdotal data for accountability regarding proposal re-write.
November 20	QUEST planning committee meeting for drafting renewal proposal.
December 6	Exploration meeting for potential trainer training candidates.
December 14	Proposal deadline.

1974

January 16	All-day QUEST planning team meet to outline publication—Michigan Association School Administrators spring meeting.

EXHIBIT XIII

SUBJECT: QUEST Meeting

FROM: L. Lippitt, QUEST Coordinator

TO: QUEST Members

DATE: February 18, 1974

A one-day *QUEST Workshop* for all teams will be held on Thursday, March 14, 1974. It will be held at *The Region Seven Center*.

The purpose will be to check were we are, look toward the Spring, enjoy all those friendly faces again and generally rejuvenate.

News Notes:

(1) We are still awaiting word on QUEST funding for next year, but teams from new schools are already being lined up for a second round.

(2) Twenty people volunteered or were nominated to help as co-training staff in the Workshop for new schools in the second round of QUEST. What fantastic support!

/sd

Approved: W. D. Edmundson

EXHIBIT XIV

SCHEDULE FOR DEVELOPMENT AND IMPLEMENTATION OF LOCAL SCHOOL PLANS OF ACTION

WHAT NEEDS TO BE DONE

WHO WILL DO IT

WHEN

WHERE

WITH WHAT RESOURCES

WHO CHECKS TO SEE THAT EVENT IS ACCOMPLISHED

EXHIBIT XV

AN ORIENTATION TO THE CONCEPT OF SHARING INVENTIONS

It is an old and universal truth that one of the very best ways to learn how to do something is to observe someone doing it first-hand. Yet we are all somewhat reluctant to be in the "limelight" or "show" someone how to do something ... for a variety of reasons: 1) We might be embarrassed by making a mistake while sharing our skill; or 2) we would be giving up something that makes us 'special', (i.e., if everyone knows how to do it..then I am just one of many). Another reason is that we are not encouraged to be helpful to others; i.e.: when a large group of elementary children were asked to complete the word-stem "helping one another..." nearly 80% said this was cheating!

We are aware that in the non-teaching fields such as medicine, industry and agriculture, when new practices are tried, the measurement of their success or failure is relatively quick and easy... the sick patient does or does not recover; the new machine does or does not do the job; the new fertilizer does or does not produce a greater crop yield.

However, when trying to measure the effects of a new teaching practice we are faced with such imponderables as human values, feelings, and behavior patterns. Thus we can never be certain whether the learning that takes place is because of, or in spite of, the new practice.

Thus, if education and teaching are ever to be able to use new knowledge with the effectiveness that is used in other fields, educators will have to bring every resource of the social sciences to bear on this important area of changes in human behavior.... teachers must acquire the skills of sharing practices with one another, in an organized and disciplined way.

EXCHANGE OF PRACTICE INTERVIEW SHEET

1. Name of this practice _____
2. What are the purposes and/or desired outcomes? _____
   _____
3. What does the practice look like in operation? (A step-by-step description of the flow of activity)
4. What materials, facilities, resources, etc., are needed?
5. What skills does the teacher need to be successful?
6. What are the traps to watch out for?
7. How have you evaluated success?
8. What adaptations or 'variations of the theme' would you suggest from your experience?

Name of the person suggesting the innovation or practice: _____

_____ Phone _____

Address _____

EXHIBIT XVI

QUEST I. WORKSHOP 3/14/74

PROCESS STOP-ACTION

(Please take 3 minutes to answer the following questions.... then share *very briefly* with your team.)

1) How do you feel about your participation in your team's work during the past hour? (Check)

Very Good	Good	Fairly Good	Not Very Good	Bad	Very Bad

2) Why do you say this?

3) If you had been an outside consultant, looking in on your team's work during the past hour, what advice would you give yourselves (as a team) about functioning more effectively?

(Spend no more than 8 minutes discussing the above)

EXHIBIT XVII

MEETING PLAN

ACTIVITY FLOW SHEET Meeting_____ Date_____

TIME	ACTIVITY	Who is Responsible	Materials and Equipment

EXHIBIT XVIII

QUEST I Planning Workshop
March 14, 1974
Post Meeting Evaluation

1. The way I feel about this meeting is:

very bad	badly	so-so	good	very good

Why?

time wasted	fairly unproductive	productive	fairly productive	time well spent

Why?

2. My image of where we go from here with QUEST IS:

very unclear	unclear	same	clear	very clear

Why?

3. In terms of further progress we can make using QUEST momentum, skills, procedures, and ideas, I am:

very pessimistic	pessimistic	so-so	optimistic	very optimistic

Why?

4. Comments about the workshop:
   a) What was especially useful or helpful or exciting?
   b) What was least useful, helpful or exciting?

5. Other comments:

EXHIBIT XIX

SUBJECT: Rescheduling the QUEST Principals' Meeting to October 30, 1973

FROM: Larry Lippitt, QUEST Coordinator

TO: Region Seven QUEST Principals

DATE: October 23, 1973

We are rescheduling the meeting of all QUEST principals, formerly to be held on October 16, to October 30, 1973, at 1:15 to 3:30 p.m., in the Region Seven Service Center.

The Agenda will include a discussion of:

—Are teams moving ahead, or do they need help getting started up again?
—Are teams clear on next steps, or do they need to make new action plans?
—What kind of special help is needed?
—Do we feel the need for a 1-day refresher night away or would individual meetings be better?
—Are people ready to go, or has the momentum been lost?
—Your help in presenting a QUEST II opportunity to other principals of Region 7.

Please get a reading from your QUEST team members and be ready to report out on the 30th. We want to begin taking action immediately in the ways which will be most helpful.

/sd

Approved _____(signed) W. D. Edmundson

EXHIBIT XX

Circular Problem Solving Process of Planned Change

Goal Setting	Action Planning
Images of the future	Force Field Analysis
Team building	Prioritizing/choosing the restraint

Brainstorming outcomes
Prioritizing/ choosing
Stop Action

Action Alternatives Brainstorm
Action Steps
Time Lines
Stop Action

Evaluation

Implementation

Interviews
Brainstorm indicators of success
Identify what worked
Identify what didn't work

Team building
Trouble shooting
Sharing ideas that Work
Meeting regularly to Monitor
Reassessing plans and altering plans

EXHIBIT XXI

SUBJECT: QUEST Documenters Meeting

FROM: Larry Lippitt, QUEST Coordinator

TO: QUEST Documentarians

DATE: October 23, 1973

We will have a meeting of all Documentarians on October 31, 1973 at 9:00–11:30 a.m., (Wednesday), in the Region Seven Service Center.

The agenda will include:

A review of why bother to collect this information.
A review of the Documentarian Form and its use.
Planning how and where and when to use the form.
Capturing current information regarding QUEST and strike effects.

It is my concern that we start up again as soon as possible (QUEST principals will be meeting on the 30th) and begin to capture a record of what is happening. Therefore, we could also spend some time discussing what your team needs are and how the rest of us can be supportive to your team moving ahead with their goals and action plans.

sd

Approved: _____(signed) W. D. Edmundson

EXHIBIT XXII.

May 15, 1973

Dear _____,

This packet contains questionnaires for students. Several teachers (QUEST Team members and other teachers) have been asked to adminis-

ter the enclosed questionnaire to one of their classes. The QUEST Project is aimed at improving education for children. Therefore, we do want to get information from them as well as from teachers.

_____, the data coordinator, will have suggestions about when and how to administer the classroom survey to your students. If you have any questions please ask them.

There will be no attempt to single out teachers or students. Only Means (average scores) will be computed for schools.

Thank you for your cooperation.

Sincerely,

_____

Lawrence Lippitt
QUEST Coordinator

/sd

EXHIBIT XXIII.

May 15, 1975

Dear _____,

A group of your faculty have been participating with seven other groups from Region Seven schools in The Quality Education Through Staff Training (QUEST) project. The purpose of this involvement is to provide resources, skills, and time which can be used to initiate desired improvements in the participating schools.

The enclosed materials are part of the QUEST attempt to evaluate this involvement and to begin measuring impact on participating schools as well as to learn what we should keep doing and what to do differently. Members of the QUEST team, faculty not currently involved as team members, and students are being asked to respond. Your cooperation in this assessment will be used by the total project and by your school to determine the effects of QUEST and to identify areas which might be focused on in the coming year.

_____ has volunteered to serve as Data Coordinator for your school. He/she will answer questions you may have. Please return your packet in the envelope to the coordinator on the date designated by them. Your response will be kept confidential: only Means (average scores) will be reported. The questionnaires should take less than twenty minutes to complete.

Your candidness and cooperation are sincerely appreciated.

Thank you.

Sincerely,

_____

Lawrence Lippitt
QUEST Coordinator

/sd

Enclosures: Profile of a school
Teacher classroom survey

EXHIBIT XXIV

SUBJECT: QUEST Evaluation in Each School

FROM: L. Lippitt, QUEST Coordinator

TO: QUEST Documentarians

DATE: February 18, 1974

We have been evaluating QUEST at many steps along the way: evaluation forms after workshops, stop action forms during workshops, observations made in schools, anecdotes about what has been happening due to team activities, and evaluation questionnaires filled out in schools by QUEST and non-QUEST teachers. Your help in administering the questionnaires in your school to QUEST and non-QUEST teachers is needed again. We want to have the materials in your hands by March 4 after the new semester begins, and get them back by March 8.

I want to have a short meeting with each documentarian to clear up questions and to review the evaluation procedures with you. To do this I would like to meet for an hour on Tuesday, February 26, at the Region Seven Center at 2:30.

Thank you.

/sd

Approved: W. D. Edmundson (signed)

EXHIBIT XXV

QUEST I Planning Workshop

March 14, 1974

Post Meeting Evaluation

1. The way I feel about this meeting is:

very bad	badly	so-so	good	very good

Why?

time wasted	fairly unproductive	productive	fairly productive	time well spent

Why?

2. My image of where we go from here with QUEST is:

very unclear	unclear	same	clear	very clear

Why?

3. In terms of further progress we can make using QUEST momentum, skills, procedures, and ideas, I am:

very pessimistic	pessimistic	so-so	optimistic	very optimistic

Why?

4. Comments about the workshop:
   (a) What was especially useful or helpful or exciting?

   (b) What was least useful, helpful or exciting?

5. Other comments:

EXHIBIT XXVI

Date_____

Teacher Classroom Survey School_____

1. What are you doing in your classroom this year which is different, exciting, fun, compared to last year?

   Question 2 & 3 deleted to save time.

4. How many times this year have you observed other classroom teachers:

5. What group problem solving skills (brainstorming, prioritizing, force field analysis, goal setting, action planning, joint decision making, etc. are you using in your relationships with students?

   (a) Where did you get the idea? (give name of person, group, publication or workshop)

   (b) Do you get any help or support to do so? (If so from who?)

6. Do you ever stop to ask the class how they think it is going (what they like and dislike, how well people are working with one another, etc.)? (Is so how often?)

7. How influential do you feel the QUEST team or activities have been in your school this past year.

Very influential in many ways	quite influential	somewhat influential	slightly influential	not influential in any ways

If you can, please give an example or explain briefly why you think this way.

EXHIBIT XXVII

STUDENT CLASSROOM SURVEY

DATE _____

SCHOOL _____

GRADE _____

Directions: Please answer each question honestly. Your answers will be kept private.

1. How do you feel about school this year?
   Why

2. What do you do in this class that is exciting, or different, or fun?

3. Do you help in planning what to do in this class? (If so how?)

4. Do you help decide how things will be done in class?

5. Does the teacher ever ask what you think of this class?

6. Complete each of the sentences below:
   a. My school is _____
   _____
   b. This teacher is _____
   _____

c. Other students are _____

d. Other teachers are _____

e. My principal is _____

f. This class is _____

g. Learning is _____

h. I am _____

EXHIBIT XXVIII

DOCUMENTATION FORMS

School _____ Date and time of meeting _____

Length of meeting _____

Documentarian _____

Type of group (Title) _____

Persons present (types of people, i.e., faculty, parents, kids, certain teachers)

_____

_____

_____

Stated objectives of meeting (if any)_____

_____

_____

What topics were discussed (content)

Was there discussion of how the group worked together? (process).

If so, what issues were raised? By whom? (Dept. head, teacher, student, principal, consortium team member, etc.)

SUMMARY OF TASKWORK (content)

Decisions made:

Unsolved issues (things left undecided)

Future plans (next steps, responsibilities assigned, etc.)

SUMMARY OF HOW GROUP WORKED (PROCESS)

What problem-solving skills were evidenced?

1. How were goals set and defined?

2. What problem solving techniques were used?

3. How were decisions made?

What group skills-behaviors were evidenced?

1. How well were people listening to each other?

2. What evidence was there of support for individuals and ideas?

3. What feelings (positive and negative) were expressed about the topic being discussed?

4. What feelings (positive and negative) were expressed about the way the group was working?

5. What were other group skills-behavior observed?

What behaviors evidenced opened communication of facts, opinion and ideas?

1. Did people check on their understanding of each other as part of the discussion?

2. Was information being sought and given?

3. Was there expression of opinions in opposition to the group?

4. Were there any other attempts to facilitate or establish open communication?

Process Summary (Personal)

Do you have any impressions of or feelings about the meeting which were not included above? If so what are they?

Anecdotes relating to personal and system changes:

EXHIBIT XXIX

Name

PROFILE OF A SCHOOL
(Form "T")

Instructions for Teachers:

1. On the lines below each item, please place an "*n*" at the point which, *in your experience*, describes your school at the present time (*n* = now). Treat each horizontal time as a continuum from the extreme at one end to the extreme at the other, i.e., do not think of the vertical lines as barriers.
2. In addition, please place an "I" on each line at the point which, *in your opinion*, describes your school as you would ideally like it to be (I = ideal).
3. Since each teacher and student differs one from the other, answer the questions as describing the average situation or reaction.

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						Item No.
I	How often is your principal's behavior seen as friendly and supportive by teachers?	Rarely	Sometimes	Often	Very frequently	1
I	How much confidence and trust does your principal have in his teachers?	A great deal	Substantial amount	Some	Not very much	2
I	How much confidence and trust do you have in your principal?	Not very much	Some	Substantial amount	A great deal	3

I	How free do you feel to talk to the principal about academic matters, such as course content, instructional plans, teaching methods, your work, etc.?	Very free	Rather free	Somewhat free	Not very free	4
I	How often are your ideas sought and used by the principal about academic matters?	Rarely	Sometimes	Often	Very frequently	5
	What is the direction of the flow of information about:	Downward from principal to teacher to student	Mostly downward	Down and up	Down, up and between teachers and administrators	
III	a. academic matters?					6
III	b. non-academic school matters					7
I	Are downward communications accepted?	Almost always accepted. If not, openly and candidly questioned	Usually accepted, sometimes cautiously	Some accepted, some viewed with suspicion	On the surface, yes. Secretly, no. Viewed with great suspicion	8
V	How accurate is upward communication?	Usually inaccurate	Often inaccurate	Fairly accurate	Accurate	9
I	How well does your principal know the problems faced by teachers?	Very well	Quite well	Rather well	Not very well	10
	How often do you try to be friendly and supportive to:	Rarely	Sometimes	Often	Very frequently	
V	a. your principal?					11
V	b. other teachers?					12

I	What is the character and amount of interaction in your school:	Extensive, friendly interaction, with high degree of confidence and trust	Moderate interaction; often with fair amount of confidence and trust	Little interaction; principal and teacher usually maintain distance from one another	Little interaction; usually with fear and distrust	
I	a. between principal and teachers?					13
II	b. among teachers?					14
IV	How much cooperative teamwork is present in your school among principal, teachers, students?	Very little	Relatively little	Moderate amount	Very substantial amount throughout school	15
III	At what level are decisions made about school matters, such as course content, instructional plans, teaching methods, student behavior, student activities, etc.?	Throughout school. Principal, teachers, and students participating in decisions affecting them	Broad policy at top; more specific decisions at lower levels	Policy at top; specific decisions by teachers, but usually checked by principal before action	Bulk at top; by principal or superintendent of schools	16
IV	Is decision-making in your school based on man-to-man or a group pattern of operation?	Man-to-man only	Man-to-man almost entirely	Both man-to-man and group	Largely group	17
IV	In general, what does the decision-making process contribute to the desire of teachers and students to do a good job?	Not very much, often weakens it	Relatively little	Some contribution	Substantial contribution	18
III	To what extent are decision makers aware of the problems of teachers?	Generally well-aware	Moderately aware	Aware of some, unaware of others	Often unaware or only partially aware	19

III	To what extent are teachers involved in decisions related to their work?	Not at all	Occasionally consulted	Usually consulted	Fully involved in all decisions	20
II	Who holds high performance goals for your school?	Principal, teachers, students, parents	Principal, most teachers, some students	Principal and some teachers	Principal only	21
V	Who feels responsible for achieving high performance goals	Principal only	Principal and some teachers	Principal, most teachers, some	Principal, teachers students	22
II	How much secret resistance is there to achieving high performance goals?	Little or no resistance and much cooperation	Some resistance and some cooperation	Moderate resistance	Strong resistance	23
III	In what manner are goals established?	Issued by administrators	Goals issued; teachers may comment	Goals issued after discussion with teachers	Goals usually established by group participation	24
II	What is the level of performance goals which administrators seek to have the school achieve?	Extremely high goals	Very high goals	High goals	Average goals	25
I	What is the general attitude of teachers toward your school as a place to work?	Strongly favorable	Usually favorable	Sometimes hostile, sometimes favorable	Hostile	26

IV	How are teachers motivated in your school?	Fear, threats, punishment, and occasional rewards	Rewards and some actual or potential punishment	Rewards, occasional punishment, and some involvement	Rewards based on group participation and involvement in setting goals, improving methods, appraising progress toward goals, etc.	27
IV	Do motivational forces conflict with or reinforce one another?	Marked conflict of forces reducing behavior in support of the school's goals	Conflict often exists; occasionally forces will reinforce each other, at least, partially	Some conflict, but often motivational forces will reinforce each other	Motivational forces generally reinforce each other in substantial and cumulative manner	28
II	How often are attitudes toward other teachers favorable and cooperative, with mutual confidence and trust?	High degree of confidence and trust	Some trust and cooperativeness	Some distrust	Frequent hostility	29
I	How much satisfaction is derived from supervision teachers receive?	High satisfaction	Moderate satisfaction	Some dissatisfaction	Usually dissatisfaction	30

EXHIBIT XXX.

SUBJECT: Personal Relevance of QUEST

FROM: L. Lippitt

TO: Each QUEST Member

DATE: April 3, 1974

There have been many facets to the QUEST training. The specific efforts and outcomes have been numerous and varied. At the recent workshops we stopped to look at what had happened since last year and where each team was headed. The focus was on teams and schools.

There has also been a personal/professional growth facet to the QUEST Training (for example the personal change project work during the August workshop). It has been my concern that involvement in QUEST would have personal/professional meaning and provide growth opportunities for each of us.

To help us evaluate this facet of the project would you please take five minutes to introspect and respond to the check list. Then pop it back into the school mail to me at the Region Seven Office.

/sd

Approved: W. D. Edmundson (Signed)

Name_____

Check List

As I think about my involvement in QUEST, way back to the first meeting or workshop and review my experiences up until the present, the following statements seem to apply: (Check any that apply and feel free to add to the list.)

_____ QUEST ideas and activities have helped me improve my teaching style and effectiveness.

_____ QUEST ideas and activities have helped me increase communication and participation in my classes.

_____ The training in QUEST has really applied to my personal life.

_____ The QUEST training has helped me understand myself better.

_____ The QUEST training has helped me understand others better.

_____ QUEST involvement has helped me solve problems more effectively in my own life.

_____ QUEST involvement has been marginally relevant to my personal life.

_____ QUEST involvement has had no personal relevancy for me.

_____ Other (Please write it here).

Please don't feel you need to spend a lot of time with this, unless you want to. *Five minutes* to introspect then check will probably be fine. If I feel the need for any further explanation I will drop by school and chat for a few minutes more.

Please do it some time today and just pop it back into the school mail to me at the Region Seven Office. I would appreciate that.

Larry Lippitt
QUEST Coordinator

EXHIBIT XXXI.

QUEST Summary Evaluation
Interview Schedule

1. Considering the total QUEST Project what do you think was the most helpful or worthwhile part of it? (A learning, an activity, resource that was provided, etc.)

2. What was an important or major personal learning or awareness which has accrued from working and participating in this project?

3. What do you see as your team's greatest success?

4. Participation in QUEST may have precipitated or facilitated decisions in your school. Are you aware of any decisions about:

   a) organization structures and procedures

   b) team activities and practices

   c) classroom activities and practices

   d) personal activities and practices

5. What are any mechanisms or structures that are in motion or adopted out of QUEST efforts?

6. Do you see any differences for kids as a result of the QUEST training, planning and practices?

QUEST Start-up Information for Team Discussion and Feedback:

1. Have you had a chance to carry out any of your plans since school started?

2. How do you feel the current school situation is affecting your QUEST goals and plans? Do they still seem appropriate and achievable?

3. How do you feel about your involvement in and commitment to QUEST now? (check one)

   _____ more committed

   _____ about the same

   _____ less committed

   Please comment on why you checked where you did:

4. What kind of continuities regarding QUEST did you notice during the strike period; for the team; between team members; between faculty, etc.
   (please list incidents, anecdotes, or happenings and describe them briefly.)

5. What kinds of help or activities do you think would be most helpful to you and the team right now?

Name_____

Strategizing for the Future

Teams list:

(1) Things we are doing with each other, or within the school that are "QUESTY" kinds of things.

(2) Then *check those most important to you* .... that you would like to see continued.
Add those things you would like to see happen.

(3) Which ones are "Fragile" and will probably need special attention?

(4) List any other things which you would like to see happen that are not happening yet.

EXHIBIT XXXII

This brief "handout" describing levels of group interaction was used during our first workshop. It helps to conceptualize the "Task" and "Process" (Maintenance) which need to be performed by individuals in any group in order to enable the group to function effectively.

WHAT GOES ON IN A GROUP

Most of us recognize that whenever persons are involved in any kind of interaction either one-to-one or in groups of various sizes, there are certain "levels" of conversation, work, or interaction. For instance, a beginning conversation may be at a very shallow or "surface" level: "Hi, how are you?" I'm fine thanks, how about you?"

At the same time, other thoughts and feelings may be going on at a much deeper level. These may be thoughts or feelings which are not spoken or mentioned at all in conversation or during a meeting, e.g.: ("Wow, where did she get that blouse....I wouldn't be caught dead in it!"), but such thoughts and feelings certainly influence what happens between persons! An example might be two persons who for some reason are antagonistic toward one another and because of this unresolved antagonism they are unable to agree on even a simple issue.

Problems at one level often carry over into other areas of interaction..... and the reverse may also be true. Good relationships established in a social group or club often help persons work together and function more effectively in the classroom, or on the athletic field.

GROUPS also function or operate on various "levels", and if we are to improve our effectiveness in groups, we need to be able to understand and identify what they are and what is going on because of them. The following paragraphs contain important information for you and your understanding of groups!

EVERY GROUP OPERATES ON AT LEAST TWO LEVELS: (1) The TASK level. (2) The PROCESS level

(1) *The TASK level is the most obvious and the most visible*, it is basically the reason the group is together....e.g., Why we are here.... It is the job we have to do, the thing we must accomplish..... like electing a chairman, getting organized, or completing a project. The TASK is always there.... facing us until we get it out of the way.

(2) *The PROCESS level*, on the other hand, *has to do with a number of issues and CONCERNS which are usually "below the surface"*, and less visible than the task. PROCESS has to do with acts or functions which must be performed if the group is to work effectively and function smoothly; for this reason we sometimes refer to these as "Maintenance functions".... because, just as an automobile cannot function well unless

certain "maintenance functions" are performed(e.g.: lubrication, tune-up, oil change, repairs, etc...), neither can a group function effectively unless certain PROCESS (or maintenance) functions are performed.

An analogy that may be helpful in understanding the relationship between TASK and PROCESS functions in a group is that of an iceberg which has only about one-eighth of its bulk visible above the water. This visible part might represent the TASK functions of a group. It may be the only portion many persons see or take into account at all.

However, experience has taught us that the bulk of the iceberg which is below the surface is also very important, and must be taken into account by ships and navigators! .....To ignore that which is below the surface is to invite disaster!

The same is true of the PROCESS functions which are so vital to the success of any group. They *must* be recognized and performed if the group is to operate with any degree of effectiveness!

A final and important fact is that both TASK and PROCESS functions may be performed by any member of the group. EVERYONE is responsible for seeing they are taken care of! Only when both the *visible* (TASK) and *less visible* (PROCESS) functions are taken into account and performed, can the group function effectively and with any degree of efficiency. Besides.... it's more fun for everyone!